# CHECKPOINT®
# USER GUIDE

TAX & ACCOUNTING

THOMSON REUTERS

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# Welcome!

Welcome to the world of tax and financial research on the World Wide Web. The Checkpoint™ research system offers you fast, effective ways to find answers to your research questions. This online help module contains all of the information you need to perform research successfully in Checkpoint.

Please check the System Requirements section for minimum and recommended requirements.

For Checkpoint support contact information, frequently asked questions, articles, tips, and documentation, access the Customer Help Center.

To start learning about Checkpoint's user interface, see the Checkpoint Screen Orientation topic.

For quick tips on using common Checkpoint features, see Checkpoint On-the-Go.

# System Requirements

## Recommended Configuration

Following are the recommended hardware, software, and communications requirements for Checkpoint:

- High-speed Internet connection
- Microsoft Internet Explorer® (latest version), Chrome™ (latest version), or Mozilla® Firefox (latest version)

## Recommended Tablet Configuration

Following are the minimum hardware and software requirements needed to use Checkpoint on a Tablet device:

- Apple iPad® (latest version) or Android™ (latest version)
- Safari® (latest version) or Android™ stock browser (latest version)

## Recommended Mobile Configuration

Following are the minimum hardware and software requirements needed to use Checkpoint on a Mobile device:

- Apple iPhone® (latest version) or Android™ (latest version)
- Safari® (latest version) or Android™ stock browser (latest version)

## Browser Settings and Compatibility

Click here to run an automatic check of your browser settings and compatibility.

# Checkpoint Password Requirements

Your Checkpoint password must have the following naming characteristics:

- Be at least 7 characters long with a maximum of 40 characters
- Include at least one alphabetic and one numeric character
- Contain no spaces

Passwords are not case sensitive. An example of a valid password is **123abc456**.

If you have issues creating a password, please contact the Checkpoint Technical Support services team at 1-800-431-9025, prompt 3.

# The Checkpoint Password Policy

**Note**: This topic applies only to Checkpoint users accessing Checkpoint through seamless access such as IP address authentication, corporate token authentication, or Single Sign On (SSO) authentication using a third party application Ping Federate Account Linking.

In order to comply with internal security and industry best practices, Checkpoint passwords are now encrypted. This will affect you in the following ways:

You will need a self-created password if you want to be able to access Checkpoint on multiple devices and browsers.

An **Enter Password** dialog box is displayed with three options:

- **I have a password** - If you know your password or have already created one previously, select this option, key in your password in the **Enter Password** field and click **Finish**.

  Upon clicking **Finish**, validation of the entered password will be made. An error message is displayed if the password is incorrect.

- **I would like to create/change my password** - If you would like to create a password or change an existing one, select this option, enter and retype the new password in the respective fields (as per the Checkpoint Password Requirements) and click **Finish**.

  Upon clicking **Finish**, validation of the entered password will be made. An error message is displayed if the passwords don't match.

- **Create a password for me** - If you would like the system to generate a password for you, select this option, check the **Generate System Password** check box and click **Finish**.

  Upon clicking **Finish**, you will be prompted with a confirmation message.

  **Note**: A system generated password will not allow you to log in with other devices such as smartphones, tablets, other computers or laptops.

  **Note**: Password details will not be included in the validation/confirmation message.

You will not be allowed to continue to Checkpoint if you click **Cancel**.

**Note**: To enable saving your username and password on multiple devices you will need to enter the same password on each device. If you change your password, you will be required to change it in all places including any other device or application (such as Speedlink, OneSource and Ultratax) that have the old password stored.

**Note**: If you select the Forgot My Password option at login, a temporary password will be sent to you and you will be forced to change your password on your next login.

# Logging in to Checkpoint

1. Launch your browser and enter the Checkpoint address in the browser location bar:

   **http://checkpoint.thomsonreuters.com**

   The **Checkpoint Login** screen appears.

   **Note**: Bookmark this page or add it to your Favorites so you will not have to retype the URL every time you want to access Checkpoint.

2. Enter your **User Name** and **Password**, and then click **Login**.

   The Checkpoint screen that appears depends on the Login and Search Practice Area settings in the General Settings Options.

   **Note**: You can use your user name and password to open only one Checkpoint session at a time. Select the **Save Name/Password** check box to save your login information. You will not be prompted to enter your User Name and Password on future Checkpoint sessions.

**Ending a Session Remotely:**

Checkpoint does not permit multiple logins with the same User ID. If you are logged into Checkpoint on another machine or browser and attempt to login, Checkpoint will provide an option for you to close the original session and continue the login process.

# Logging Out

It is important that you log out from Checkpoint correctly before closing your browser. If you close your browser without logging out, the system continues to view your account as being active, and you will not be able to access Checkpoint for 60 minutes.

**To log out at the conclusion of your research session:**

On the top toolbar of any Checkpoint screen, click **Sign Out**.

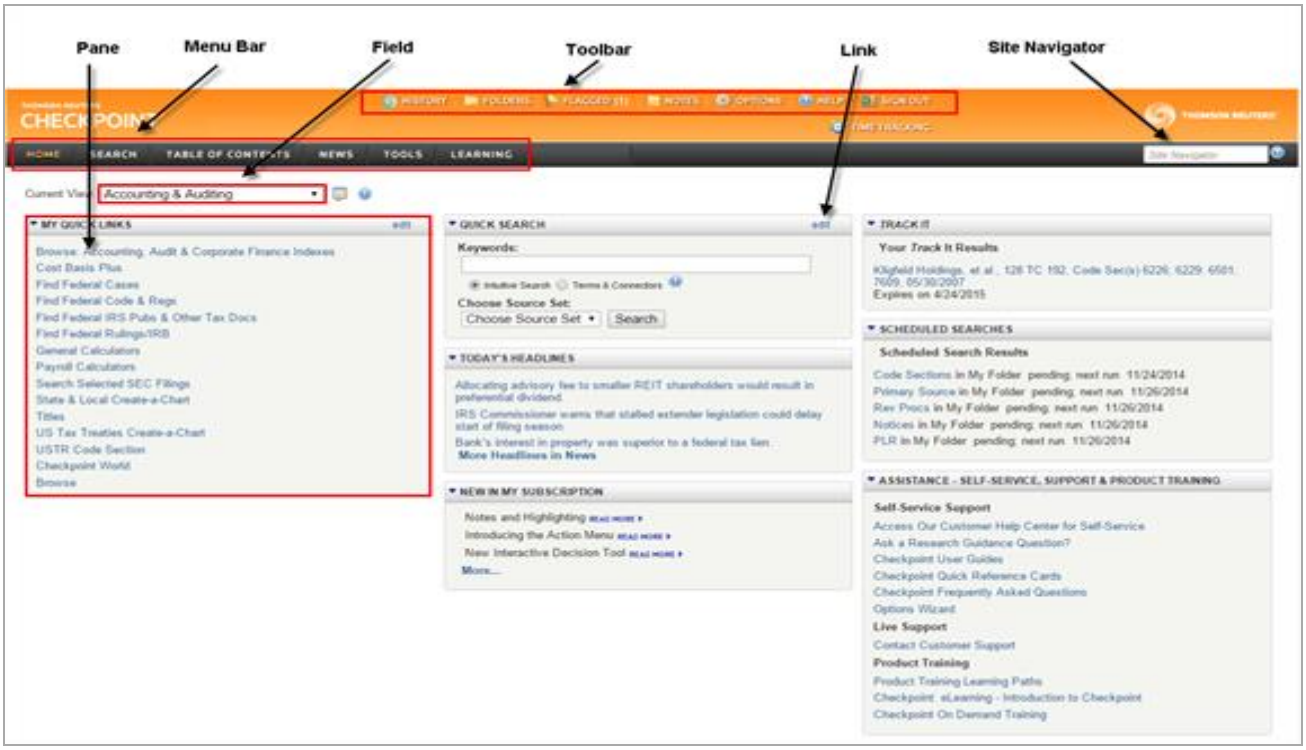
**Note**: If you are logged in, but do not use Checkpoint for 60 minutes, your session automatically times out. To start a new session, enter your user name and password on the **Checkpoint Login** screen.

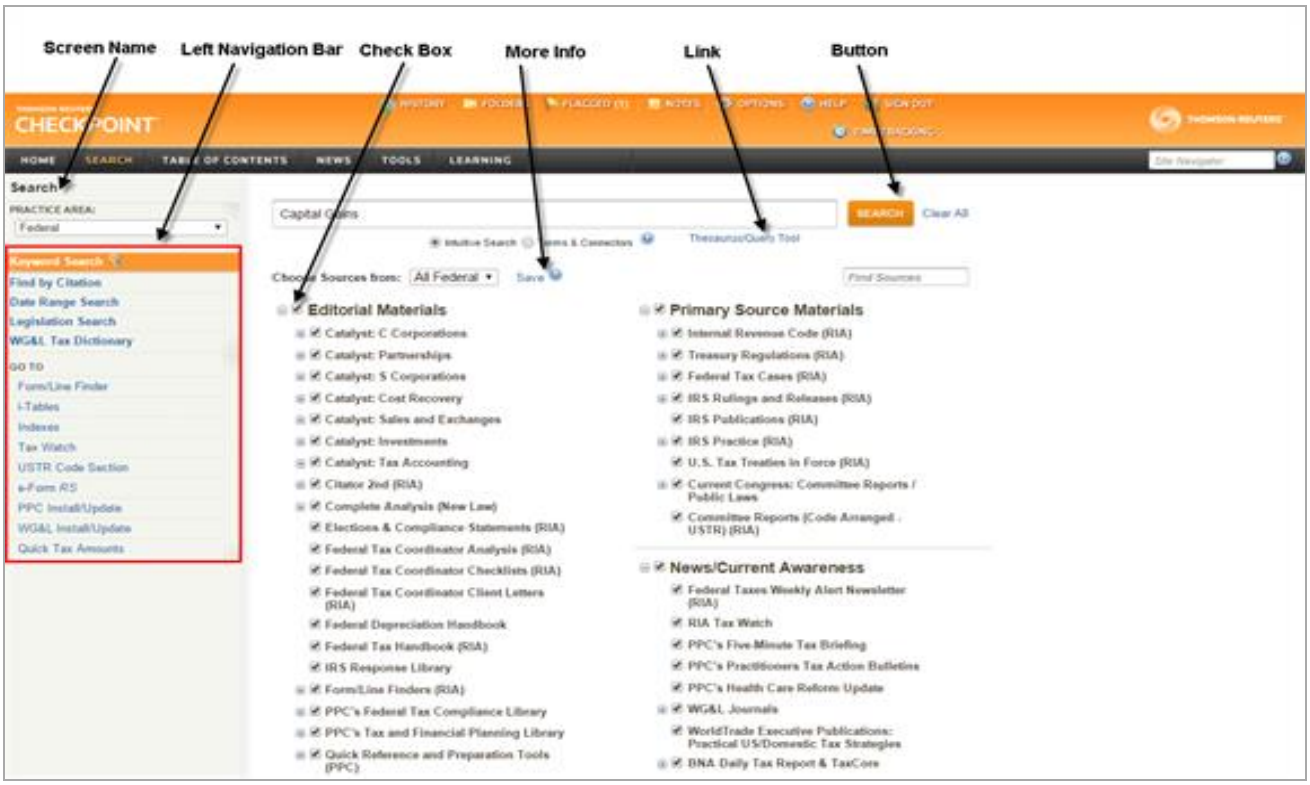
**To end a session remotely:**

If you are logged into Checkpoint on another machine or browser and attempt to login, Checkpoint will provide an option for you to close the original session and continue the login process.

# Checkpoint Screen Orientation

In other Help topics you will be instructed to click or select certain screen elements. The following images show labels that identify these elements.




Screen Name
Left Navigation Bar
Check Box
More Info
Link
Button
CHECKPOINT
HOME
SEARCH
TABLE OF CONTENTS
NEWS
TOOLS
LEARNING
Search
PRACTICE AREA:
Federal
Keyword Search
Find by Citation
Date Range Search
Legislation Search
WG&L Tax Dictionary
GO TO
Form/Line Finder
i-Tables
Indexes
Tax Watch
USTR Code Section
e-Form RS
PPC Install/Update
WG&L Install/Update
Quick Tax Amounts
Capital Gains
SEARCH
Clear All
Choose Sources from:
All Federal
Save
Editorial Materials
Catalyst: C Corporations
Catalyst: Partnerships
Catalyst: S Corporations
Catalyst: Cost Recovery
Catalyst: Sales and Exchanges
Catalyst: Investments
Catalyst: Tax Accounting
Citator 2nd (RIA)
Complete Analysis (New Law)
Elections & Compliance Statements (RIA)
Federal Tax Coordinator Analysis (RIA)
Federal Tax Coordinator Checklists (RIA)
Federal Tax Coordinator Client Letters (RIA)
Federal Depreciation Handbook
Federal Tax Handbook (RIA)
IRS Response Library
Form/Line Finders (RIA)
PPC's Federal Tax Compliance Library
PPC's Tax and Financial Planning Library
Quick Reference and Preparation Tools (PPC)
Primary Source Materials
Internal Revenue Code (RIA)
Treasury Regulations (RIA)
Federal Tax Cases (RIA)
IRS Rulings and Releases (RIA)
IRS Publications (RIA)
IRS Practice (RIA)
U.S. Tax Treaties in Force (RIA)
Current Congress: Committee Reports / Public Laws
Committee Reports (Code Arranged - USTR) (RIA)
News/Current Awareness
Federal Taxes Weekly Alert Newsletter (RIA)
RIA Tax Watch
PPC's Five-Minute Tax Briefing
PPC's Practitioners Tax Action Bulletins
PPC's Health Care Reform Update
WG&L Journals
WorldTrade Executive Publications: Practical US/Domestic Tax Strategies
BNA Daily Tax Report & TaxCore

# Checkpoint Content Menus

Checkpoint uses a menu bar organize its features and tools. You can hover your mouse pointer over the Search, Table of Contents, News, and Tools menus to see a list of options that you can select. You can also click each menu to display the menu's main screen. The following table describes each menu's features and functions.

| | |
|---|---|
| | The **Home** menu provides a central location for reviewing new Law Alerts, Tax News headlines, and the latest scheduled search results. You can also see the new features and content that have been added to your subscription and review support and training information. "New" appears on the **Home** menu to alert you to new content on the **Home** screen. |
| | The **Search** menu contains links to Checkpoint's search features. Areas that can be searched include Federal, State and Local, Estate Planning, Pension & Benefits, International, Payroll, and Finance. When you click **Search**, the **Search** screen appears with Federal as the default practice area view. |
| | The **Table of Contents** contains links to high-level search features that let you browse for specific content in Checkpoint, including Titles, Forms/Line Finder, USTR Code Section, GAAP Reporter, IFRS Reporter, SOX Reporter, and BNA Portfolios. When you click **Table of Contents**, the **Table of Contents** screen appears with Browse as the default view. |
| | The **News** menu contains links to tax news content such as RIA Daily Update, Accounting and Compliance Alert, PPC's Daily Update, BNA Daily Tax Report, BNA International Tax Monitor, IBFD Tax News Service, Towers Watson, Sabrix VAT News, and EBIA Weekly. When you click **News**, the **News** screen appears with RIA Daily Updates as the default view. |
| | The **Tools** menu contains links to Checkpoint productivity tools like AccuDraft - DocsEngine, Bridge-It, Calculators, Cost Basis Plus, Create-a-Chart, DoneDeals, FASB Codification, I-Metrix, i-Tables, Interactive Checklists, International Tax Tools, Nexus Assistant, PPC Install/Update, Sales & Use Tax Rate Lookup, Single Audit Compliance, State Apportionment, State Tax Chart Builders (BNA), Tax Developments Wizard, and WG&L Install/Update. When you click **Tools**, the **Tools** screen appears with General Calculators as the default view. |
| | The **Learning** menu contains links to a wide range of online, in-house, and self-study courses for which you can register to further your learning and skill development. |

| | |
|---|---|
| | When you type search criteria in the **Site Navigator** field, Checkpoint automatically displays a list of documents, tools, or features that include your search term. |

# Top Toolbar

The toolbar is available at the top of every screen in Checkpoint. You click the toolbar links to access the following functions.

| | |
|---|---|
| | Click **History** to access your recent searches and the documents you have viewed. |
| | Click **Folders** to retrieve searches and documents you have saved in the past. You can organize your saved searches and documents into folders for easy retrieval. |
| | Click **Flagged** to view a list of recently flagged documents. The number in the header represents the number of flagged documents on the Flagged Documents list. |
| | Click **Notes** to view a list of all document notes and all folder notes. |
| | Click **Options** to set your preferences for interacting with Checkpoint, including search results display, document export format, and newsletter subscription. |
| | Click **Time Tracking** to assign time spent in Checkpoint to Time Tracking projects. These projects can then be printed or exported into your time and billing system to bill back your Checkpoint time to your clients. |
| | Click **Help** to learn how to use Checkpoint's features and perform specific actions. |
| | Click **Sign Out** to close your active session of the Checkpoint application. |
|  | Click **Exports** to view the list of recently exported documents. The **Exports** link appears on the top toolbar only after you export a document in your active session. |

# Helpful Browser Features

Use a web browser such as Microsoft Internet Explorer or Mozilla Firefox to access the Checkpoint site. Checkpoint provides its own toolbar, menu bar, and navigational tools within the site. Checkpoint also provides the ability to print, export, and e-mail from within documents. When necessary, you can also use some of your browser's navigation features.

The following browser features can assist you in navigating and using Checkpoint. You either click the corresponding icon on the browser toolbar, or select the appropriate menu command. The graphics in the table are from Internet Explorer.

| Toolbar | Menu Path | Function |
|---|---|---|
| | View > Go To > Back | Returns to a previously viewed page. |
| | View > Go To > Forward | Returns to a page viewed before using Back. You can use Forward only after using Back. |
| | View > Go To > Home Page | Returns to the browser's home page and not Checkpoint's home page. Be aware that if you use this feature, your Checkpoint session remains active until you return to Checkpoint and log out. |
| | View > Stop | Stops downloading a new file or accessing a web page. Use this selection when the system is bogged down, or if you want to cancel an action. |
| | File > Print | Prints the current browser screen. To print documents in Checkpoint, use the Checkpoint print icon at the top of the **Document** screen. |
| | Favorites > Add to Favorites | Saves a browser page or Checkpoint page for easy retrieval during a Checkpoint session. You must be logged in to Checkpoint for a Favorites link to a Checkpoint page to work. |

# Setting Checkpoint User Options

The **Options** pop-up window displays Checkpoint's current or default settings. You can use this window to set your own preferences for Checkpoint. You can either set each of the options individually, or use the Options wizard to set them at the same time. This topic discusses setting each option individually.

**To set your own preferences:**

1. On the top toolbar, click **Options**.

   The **Options** window appears with the General Settings view as the default.

2. On the left navigation bar, you can select the options to display their settings templates.

   **Click here to see navigation bar options:**

3. You can change the settings for each of the options by entering values in fields, list boxes, check boxes, and option buttons in the template.

   **Note**: In the templates, you can select one or multiple check boxes, or clear them. However, you can choose only one option button (circular buttons) among a group of option buttons.

4. When you make changes to these options, you must click **Save and close** at the bottom of the window to save the changes.

   **Note**: If necessary, you can click **Cancel** at the bottom of each template to return to the original options settings.

# Using the Options Wizard

The **Options** pop-up window displays Checkpoint's current or default settings. You can either set the options individually, or use the Options Wizard to set them at the same time. This topic discusses setting the options using the Options Wizard.

**To set Checkpoint options using the Options Wizard:**

1. On the top toolbar, click **Options**.

   The **Options** window appears with General Settings as the default view.

2. On the left navigation bar, under **Go To**, click **Options Wizard**.

   The **Welcome** screen appears.

   **Note**: The Wizard's left navigation bar highlights the step you are on as you go through the wizard. At any time during the wizard, you can click the step numbers to jump to a specific page.

3. On the **Introduction** screen, click **Next**.
4. On the **User Information** screen, make any necessary changes to your name or e-mail address, and click **Next**.
5. On the **Time Zone** screen, select the time zone you want to use for your Checkpoint sessions and click **Next**.
6. On the **Startup Tab** screen, select the menu screen that you want to see when you first access Checkpoint, and click **Next**.
7. On the **Home Tab** screen, select default view that you want to see when you access the **Home** tab, and click **Next**.
8. On the **Search Practice Area** screen, select the Practice Area (type of content) you use most frequently, and click **Next**.
9. On the **News View** screen, select which news source you want to see as the default when you access the **News** screen, and click **Next**.
10. On the **Newsletter Delivery** screen, select whether you want your subscribed news content to be e-mailed to you, and click **Next**.

    **Note**: If you selected Yes in the previous step, upon clicking Next, the **E-mail Frequency** screen appears allowing you to select the frequency for e-mail delivery for each newsletter you subscribe to. Make your selection by selecting the appropriate check box(es) and click **Next**.

11. On the **Export** screen, select the target program to which information would be exported, and click **Next**.

**Note**: You can also select whether to export multiple documents in a .zip file or whether to show links in exported documents.

12. On the **Search and Display** screen, select the search results settings, and click **Next**.
13. On the **Time Tracking** screen, select whether you would like to see your Time Tracking project listed right after login to Checkpoint, and click **Next**.
14. On the **Setup Complete** screen, click **Finish**.

**Note**: If you need to make changes to your preferences, you can make changes to the individual settings on the Options pop-up window.

# Setting Document Options

Use the **Document Options** window to set the display features and navigation controls while viewing a document. To open this window, click the icon in the document tools while viewing a document.

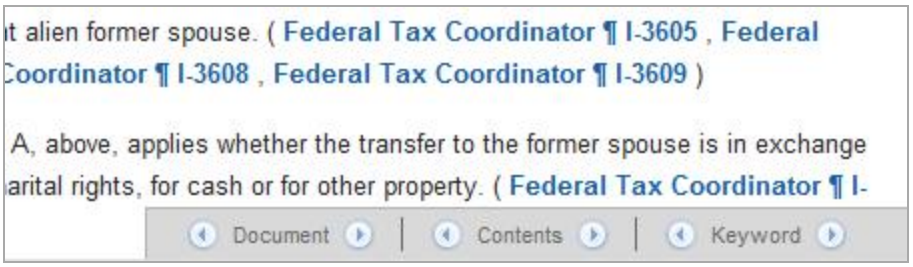
## Display Options

On the **Display** tab of the **Document Options** window, you can format your fonts using the **Font Size**, **Font Family** and **Text Width** options. Additionally, you have **Content Options** and **Navigation Controls** options that help you edit the visibility of notes, highlights and navigation arrows.

## Screen Options

On the **Screen** tab of the **Document Display Options** window, you can set text size, font, and navigation controls. You can select whether to show notes and highlights. You can also set text width to full screen or page width. Full screen will expand as wide as the space available in the browser window. Page Width will only expand to a recommended reading width.

Select the **Show Navigation Arrows** check box if you want to turn on a set of navigation controls for the document display.


it alien former spouse. ( Federal Tax Coordinator ¶ I-3605 , Federal
Coordinator ¶ I-3608 , Federal Tax Coordinator ¶ I-3609 )
A, above, applies whether the transfer to the former spouse is in exchange
arital rights, for cash or for other property. ( Federal Tax Coordinator ¶ I-
Document
Contents
Keyword

The Document, Contents, and Keyword arrows float at the bottom of the document pane.

- The **Document** arrows move forward or backward through the documents across all the sources.
- The **Contents** arrows display the previous or next document in the Table of Contents. This may not include documents that were part of your search results.
- The **Keyword** arrows move forward or backward through the matching search keywords within the current document.

## Print Options

On the **Print** tab of the **Document Display Options** window, you can set the parameters for how your document will print, including font, font size, display notes, display highlights, display keyword hits and display compass icon.

Click **Close** to save and close the window or click **Restore Defaults** to revert the settings to Checkpoint defaults.

## Export Options

On the **Export** tab of the **Document Options** window, you can set the format in which you require your output using the **Format** option. You can also made edits to the document header using the **Header** option and create .ZIP files for combined documents using the **Multiple** options. Additionally, use the **Content** option to either use the Display tab settings or use individual settings for **Links**, **Notes Highlights**, **Keyword hits** and **Compass icon** within a document.

## Email Options

On the **Email** tab of the **Document Options** window, you can select desired preferences for your documents using the **Format**, **Header**, **Multiple** and **Content** options. Additionally you can add a message in the Default Disclaimer field within the email tab.

# Setting General Options

The **Options** pop-up window displays Checkpoint's current or default settings. You can use this window to set your own preferences for general settings options.

**To set general settings options:**

1. On the top toolbar, click **Options**.

   The **Options** window appears.

2. On the left navigation bar, click **General Settings** (default view).

3. Make the changes you want to the **Application**, **Time Zone**, **Default Tab**, **Search Practice Area**, and **History** settings.

| | |
|---|---|
| **Time Zone** | All dates / time stamps within Checkpoint can be set to use the your local time. Click the **Change** link to change the time zone. |
| **Default Tab** | Select the default screen that appears when you log in to Checkpoint. This option works in conjunction with the Search Practice Area selection. |
| **Previous Search** | Use the Previous Research option to ensure the data accessed by you before logoff/timeout is displayed when you next access Checkpoint. |
| **Search Practice Area** | Select the practice area to which you will be taken when you log in. You can choose to always revert to the most recent practice area in which you were working, or you can select a practice area from the Always Use list. |
| **History** | Select this option if you want to store your research session in the History feature. |

4. After making your changes, click **Save and close** to save the changes.

**Note**: If necessary, you can click **Cancel** to return to the original settings.

# Setting the News Options

The **Options** pop-up window displays Checkpoint's current or default settings. You can use this window to set your own preferences for the four sets of News options. Each set lets you configure a different aspect of Checkpoint News including view, display, and e-mail newsletters, and RSS feeds.

**To set the news options:**

1. On the top toolbar, click **Options**.

   The **Options** window appears.

2. On the left navigation bar, click **News**.

3. Select the News settings for **News Service**, **News E-mail/Display**, **Journals E-mail**, **RSS Feeds**.

## News Service

Select the **Default News Service** you want to appear when you click the **News** menu:

- News & Insight
- RIA Daily Updates
- Accounting & Compliance Alert
- PPC's Daily Update
- BNA Daily Tax Report & Tax Core
- BNA International Tax Monitor
- IBFD Tax News Service
- Towers Watson
- EBIA Weekly
- AAEI International Trade ALERT
- Sabrix VAT News

After selecting the default view, click **Save and close**.

## News E-mail/Display

Use the **News E-mail/Display** option to subscribe to and select the format and display settings for the following newsletters:

- RIA Newsletters
- Accounting & Compliance Alert
- PPC News

- BNA Daily Tax Report & Tax Core
- BNA International Tax Monitor
- IBFD Daily Tax News Service
- Sabrix Global Tax Update
- Towers Watson
- AAEI International Trade ALERT
- EBIA Weekly

Newsletters will be sent to the e-mail address you specify in the options.

Click the following links to learn more about the newsletter options.

### RIA Newsletters

You can subscribe to a range of RIA newsletters and have them sent to you by weekly e-mail. The e-mail message you receive includes a link to the newsletter in Checkpoint, news highlights for the week, and WG&L Journal digest. The full text of the newsletter is also attached in document format.

Select the format for the RIA newsletters from two columns of check boxes:

- Complete Newsletter - The newsletter is distributed as a complete publication, one newsletter per e-mail.
- Daily Update - The newsletter is distributed as a series of daily updates. All daily update newsletters are grouped together in a single e-mail.

A third column of check boxes, Display Options, lets you choose which updates you want to appear on the News screen.

Click the **E-Mail News Flashes for any e-mailed newsletters** check box to receive updated e-mail notifications for any of your newsletters.

**Note**: This option also controls the display of the News Flash updates in the News and Home screens. You must have the option selected to see News Flash updates for each newsletter or news service.

There is also a **Customize** link next to the check boxes associated with these newsletters:

- Corporate Finance Weekly Update
- Payroll Guide (Bi-weekly)
- State & Local Taxes Weekly Newsletter

Click the Customize links to select filtering options for the newsletters. A new window shows all available options. After selecting the appropriate check boxes next to the filtering options, click **Save and close**.

### Accounting & Compliance Alert

Select this option to receive the Account & Compliance Alert Highlights newsletter in the desired format and change display and customization settings.

Use Browse Recent News to set the browsing preferences for the newsletter. When viewing the newsletter on the News screen, these preferences filter the news articles by the category you define. Select an option from the Sort By drop-down list and click **Save and close**.

Use the Customize Browse link to select the topics you want to display when browsing recent news articles in the Accounting & Compliance Alert newsletter. Select the check boxes for the topics you want to display and click **Save and close**.

Click the Customize links to select filtering options for the newsletter. A new window shows all available options. After selecting the appropriate check boxes next to the filtering options, click **Save and close**.

### PPC News

Select this option to receive the PPC News newsletters in the desired format. Select the check boxes for the newsletters you want to receive in an e-mail and click **Save and close**.

### BNA Daily Tax Report & TaxCore

Select this option to receive the BNA Daily Tax Report & TaxCore newsletter in the desired format. You can also click the **E-Mail Real-Time updates in addition to BNA Daily Tax Report & TaxCore** check box to receive real-time updates. Select the check boxes for the features you want and click **Save and close**.

### BNA International Tax Monitor

Select this option to receive the BNA International Tax Monitor newsletter in the desired format. Select the check box for the format you want and click **Save and close**.

### IBFD Daily Tax News Service

Select this option to receive the IBFD Daily Tax News Service newsletter in the desired format and with customized jurisdictions. Select the check box for the format you want and click **Save and close**.

Click the Customize links to select filtering options for the newsletter. A new window shows all available options. After selecting the appropriate check boxes next to the filtering options, click **Save and close**.

### Towers Watson

Select this option to receive the Towers Watson newsletters in the desired format. Select the check boxes for the newsletters and format you want and click **Save and close**.

### EBIA Weekly

Select this option to receive the EBIA Weekly newsletter in the desired format and with customize topics. Select the check box for the format you want and click **Save and close**.

Click the Customize links to select filtering options for the newsletter. A new window shows all available options. After selecting the appropriate check boxes next to the filtering options, click **Save and close**.

### AAEI International Trade Alert

Select this option to receive the AAEI International Trade Alert Weekly newsletter in the desired format and with customize topics. Select the check box for the format you want and click **Save and close**.

Click the Customize links to select filtering options for the newsletter. A new window shows all available options. After selecting the appropriate check boxes next to the filtering options, click **Save and close**.

### Journals E-mail

This option lets you specify which WG&L Tax Journals, WG&L Financial Reporting and Management, World Trade Executive Publications, and BNA Publications journals you want to receive through e-mail. There are two options for receiving the journals, although not all journals have both options available:

- **Complete Journal** - Select this option to receive notification in an e-mail when the new journal issue is available in Checkpoint.
- **Journal Preview** - Select this option to receive an e-mail containing article highlights from the latest journal issue.

You can select both options to receive an e-mail notification when a new issue is available and to receive article highlights.

When you have completed adjusting your journal e-mail options, click **Save and close**.

**Note**: For WG&L Financial Reporting and Management, BNA Publications, and World Trade Executive Publications journals, you can select to receive only a complete journal. The journal preview option is not available for these publications.

### RSS Feeds

This option provides links to add RSS Feeds for RIA News Content to your RSS reader. Really Simple Syndication (RSS) is a web-based technology that lets you automatically receive updated headlines and news feeds for Checkpoint newsletter content. To receive and view an RSS feed you must have an RSS reader installed through your browser or from your local desktop.

To enable a Checkpoint RSS newsletter feed, right-click the icon next to each newsletter, and then click **Copy Shortcut** from the menu. (In Firefox, you select **Copy Link Location** from the menu.) Paste the URL into your RSS reader to set up the feed.

4. After making changes to the News options, click **Save and close** to save the changes.

**Note**: If necessary, you can click **Cancel** to return to the original settings.

# Setting Personal/Password Options

The **Options** pop-up window displays Checkpoint's current or default settings. You can use this window to set your own preferences for personal user information and Checkpoint password options.

**To set personal/password options:**

1. On the top toolbar, select **Options**.

   The **Options** window appears.

2. On the left navigation bar, click **Personal/Password**.

3. Make the changes you want to the **Personal** and **Password** settings.

   **Note**: Your customer number is displayed in this section, but cannot be changed.

| | |
|---|---|
| **Personal** | The Personal section contains your first name, last name, and e-mail address. You can change these settings as needed. Your e-mail is used to notify you of new results from scheduled searches, send newsletter subscriptions, and send a forgotten password.<br><br>**Note**: You can click the **How We Use Your E-mail Address** link to learn more. |
| **Password** | In the Password section, you can clear a stored username and password from the auto-login functionality by clicking the labeled link. This allows you to re-enter your login information for a new user or a changed password.<br><br>1. To change your password, click **Change Password**.<br>2. On the Change Password dialog box, follow the instructions and click **OK** to update your password.<br><br>Your Checkpoint password must meet the following requirements:<br><br>• Be at least seven characters long with a maximum of 20 characters.<br>• Include at least one alphabetic and one numeric character.<br>• Contain no spaces.<br><br>Passwords are not case sensitive. An example of a valid password is **123abc456**.<br><br>If you have any issues creating a password, please contact the Checkpoint Technical Support services team at 1-800-431-9025, prompt 3. |

4. After making your changes, click **Save and close** to save the changes.

> **Note**: If necessary, you can click **Cancel** to return to the original settings.

**Note**: If you are a Speedlink user and change your Checkpoint password, remember to update your stored Checkpoint password in Speedlink to match the new password you created in Checkpoint.

# Setting Search/Display Options

The **Options** pop-up window displays Checkpoint's current or default settings. You can use this window to set your own preferences for search results and search display options.

**To set search/display options:**

1. On the top toolbar, select **Options**.

   The **Options** window appears.

2. On the left navigation bar, click **Search/Display**.

3. Make the changes you want to the **Search Results**, **Keywords**, and **Table of Contents** settings.

| | |
|---|---|
| **Search Results** | Use these options to define how you want to view your document search results:<br><br>**Search Result Default View**<br><br>With the following options, you can select how you want to display your search results on the Search Results screen:<br><br>• Select **Source List** to display the number of documents contained in each source type. (default setting)<br>• Select **All Documents** to display all of the documents that meet your search criteria.<br>• Select **Table of Contents** to display the documents that meet your search criteria in the Table of Contents hierarchy format.<br>• Select **Use Last** to use the same search setting that you used for your previous search.<br><br>**Display Filter Options**<br><br>With the following options, you can select whether to see hits only or text surrounding the keyword hit:<br><br>• Select **View Sources with Hits Only** to have the Search Results list display only sources that include hits. Clearing this check box displays all sources in the Search Results list, including those with 0 hits.<br>• Select **Display Words Around Hits** to see a brief excerpt of the document text containing the keyword hit in the document list results. This lets you determine whether the document pertains to your search goals. (default setting). |
| **Keywords** | Use these options to change your keyword search settings: |

| | |
|---|---|
| | Select **Automatically apply all thesaurus terms** if you want all available thesaurus terms to be applied automatically to your keyword searches.<br><br>**Warning**: Selecting this option results in a large number of search hits and may not provide targeted results for your research topic. The recommended setting is to keep this check box clear and use more focused keyword and thesaurus alternatives using the link found next to each keyword entry field.<br><br>Select **Show AutoComplete** to toggle on and off the automatic search query completion feature on the Keyword Search field. This feature suggests keyword terms when you begin typing in the Keyword Search field. Suggested terms are generated using the most popular matching terms from all Checkpoint user searches and your personal search history. |
| **Table of Contents** | Use these options to change your Table of Contents format display settings:<br>• Select **Show all levels** to view all branches of the Table of Contents, even those that do not contain hits. (default setting)<br>• Select **Show only levels with hits** to view only those branches of the Table of Contents that contain hits. |

4. After making your changes, click **Save and close** to save the changes.

**Note**: If necessary, you can click **Cancel** to return to the original settings.

# Setting Previous Research Options

Conducting research is one of Checkpoint's primary activities. The goal is to find the information you need from Checkpoint's sources as quickly and efficiently as possible. **Previous Research** ensures the data accessed before logoff/timeout is displayed when you next access Checkpoint. A popup window displays, giving you the option of returning to your previous research. You may customize your options from a list of **Recent Documents** or **Recent Searches/Tools**.

**To activate the Previous Research option:**

1. Click **Options** from the menu bar at the top. The **Options** pop-up window appears.
2. On the Options window click **General Settings** from the left navigation bar.
3. On the right pane select the check box next to **Previous Research**.
4. Click **Save and Close.**

Once Previous Research has been activated, an option is available to view the **Previous Research** dialog on your default tab.

**To view the Previous Research dialog on your default tab:**

1. Click **Options** from the menu bar at the top. The **Options** pop-up window appears.
2. On the Options window click **Options Wizard** under **Go To** on the left navigation bar.
3. Click **Next** until the **Startup Tab** screen appears.
4. On the right pane, select the **Display previous research dialog on my default tab** check box.
5. Click **Next** till the **Finish** button appears at the end of the wizard.
6. Click **Finish**.

# Setting Single Sign On Options

The **Options** pop-up window displays Checkpoint's current or default settings. You can use this window to set your own preferences for establishing or resetting the Single Sign On link between Checkpoint and other applications.

**To set single sign on options:**

1. On the top toolbar, select **Options**.

   The **Options** window appears.

2. On the left navigation bar, click **Single Sign On**.

3. For the applications that you want to set up for single sign on, click the **Establish** link next to each application.

4. When the application's online form appears, enter your log-in credentials and follow the instructions.

5. Click **Save and close** to save the changes.

> **Note**: If necessary, you can click **Cancel** to return to the original settings.

# Setting Time Tracking Options

The **Options** pop-up window displays Checkpoint's current or default settings. You can use this window to set your preference to have Checkpoint display your time tracking project list immediately after login.

**To set time tracking project list to display after login:**

1. On the top toolbar, click **Options**.

   The **Options** window appears.

2. On the left navigation bar, click **Time Tracking**.
3. Select the **Display project list after login** check box.
4. Click **Save and close** to save the change.

> **Note**: If necessary, you can click **Cancel** to return to the original settings.

Your **Time Tracking** project list becomes the first screen that appears each time you log in to Checkpoint.

To create a project and begin tracking time, use the Time Tracking feature on the top toolbar.

# Setting Up a Newsletter RSS Feed

The **Options** pop-up window displays Checkpoint's current or default settings. You can use this window to set your own preferences for RSS feeds.

Really Simple Syndication (RSS) is a web-based technology that lets you automatically receive updated headlines and news feeds for Checkpoint newsletter content. To receive and view an RSS feed, you must have an RSS reader installed through your browser or from your local desktop.

**To enable a Checkpoint RSS newsletter feed:**

1. On the top toolbar, click **Options**.

   The **Options** window appears.

2. On the left navigation bar, click **News**.
3. Click **RSS Feeds**.
4. Right-click the icon next to each Newsletter title and click **Copy Shortcut** in the pop-up menu.

   **Note**: In Firefox, you select **Copy Link Location** from the pop-up menu.

5. Paste the **URL** into your RSS reader to set up the feed.

# Help Me Choose—Newsletter E-mail Delivery

As part of the **News** service, you can subscribe to a range of Checkpoint newsletters and have them sent to you by e-mail. Select **Yes** if you would like to have newsletter content sent to you via e-mail.

You can select to have newsletters delivered in a complete **weekly publication** or as a **daily update**.

The body of each weekly newsletter e-mail message includes:

- Link to the newsletter on Checkpoint
- News highlights for the week
- WG&L Journal digest

The full text of the newsletter is attached in document format.

Newsletters in daily update format are distributed as a series of daily updates. All daily update newsletters are grouped together in a single e-mail. Articles are sent immediately as they are written rather than waiting for the publication to be complete. Each e-mail contains a brief summary of each article with a link to Checkpoint to view the the article.

Regardless of which e-mail option you choose, the news content is equivalent. The newsletter choices let you designate when to receive the content. Here is a summary of how e-mailed news content can be delivered based on the two frequency selections:

- **Complete Newsletter**—Each publication is in its own e-mail. The newsletter title indicates the frequency. You then receive the newsletter when it is complete. Your newsletter contains a brief summary of each article along with a link to the full text on Checkpoint. You also receive an attachment containing the complete full text of the newsletter.
- **Daily Update**—You receive one daily newsletter update e-mail containing articles for the newsletters you are interested in. You only receive one daily e-mail made up of all the articles written that day from your selected list of newsletters. Articles are sent immediately as they are written. Each e-mail contains a brief summary of each article with a link to Checkpoint to view the full text of the article.

# Help Me Choose—Newsletter E-mail Frequency

Select any newsletters you want to receive by e-mail by clicking the applicable check boxes. You can select from two formats for the e-mail newsletters:

- **Complete Newsletter**—The newsletter is distributed as a complete publication, one per e-mail.
- **Daily Update**—The newsletter is distributed as a series of daily updates. All daily update newsletters are grouped together in a single e-mail. Articles are sent immediately as they are written rather than waiting for the publication to be complete.

### WG&L Tax Journals E-mail

This section of the News options lets you specify which WG&L journals you want to receive via e-mail. You have two options to select from for each journal:

- **Complete Journal**—You receive an e-mail informing you when the new journal issue is available in Checkpoint.
- **Journal Preview**—You receive an e-mail containing article highlights from the latest journal issue and a link to the complete article.

You can select both options to receive an e-mail notification when a new issue of the publication is available and receive article highlights.

**Note**: Journals within the WG&L Financial Planning and Management, World Trade Executive Publications, and BNA Publications categories can only be received in Complete Journal format.

# Help Me Choose—Home Screen

The Checkpoint **Home** screen provides a central location for reviewing News Flashes, Law Alerts, Tax News headlines, and the latest scheduled search results. You can also see what new features and content have been added to your subscription recently. Using the **Home** screen, you can customize a wide range of search tools and content links to best suit your Checkpoint usage and research needs.

Select the predefined view that best describes your Checkpoint usage and research objectives from the **Current View** drop-down list. You can modify this view or create a new custom view by clicking the **Manage my views** icon at the top of the **Home** screen.

# Help Me Choose—Search Practice Area

Select the practice area that you use most frequently. When you log in to Checkpoint, this practice area's sources and search options are displayed automatically on the **Search** screen. You can also elect to have Checkpoint always display the last practice area you used by selecting the **Use Last Practice Area Searched** option.

# Help Me Choose—Startup Screens

Select which screen you want to view each time you log in to Checkpoint. The six options are Home, Search, Table of Contents, News, Tools, and Learning.

| | |
|---|---|
| | The Checkpoint **Home** screen provides a central location for reviewing new Law Alerts, Tax News headlines, and the latest scheduled search results. You can also see what new features and content have been added to your subscription recently and review support and training information. |
| | The **Search** screen contains Checkpoint's search features. This is the recommended start-up screen. |
| | The **Table of Contents** screen contains links to high-level search features that let you browse for specific content in Checkpoint. |
| | The **News** screen contains tax news headlines and news content such as RIA Daily Update, BNA Daily Tax Report, BNA International Tax Monitor, IBFD Tax News Service, Towers Watson, and PPC's Daily Update. |
| | The **Tools** screen contains Checkpoint productivity tools like Calculators, Create a Chart, and i-Tables. |
| | The **Learning** screen contains links to Checkpoint Learning CPE training, which provides a wide range of superb courses to further your learning and skill development. |

# Setting Up RSS Feeds in Checkpoint

Really Simple Syndication (RSS) is a web-based technology that lets you receive updated headlines and news feeds for Checkpoint newsletter content automatically. To receive and view an RSS feed you must have an RSS reader installed through your browser or from your local desktop.

**To set up a Checkpoint RSS newsletter feed:**

1. Click **Options** on the Checkpoint top toolbar.
2. On the left navigation bar, click the **News** link to open the **News** options menu.
3. Click the **RSS Feeds** link.
4. Right-click the icon next to each newsletter title and select **Copy Shortcut** from the right-click menu. (This option is called **Copy Link Location** in Firefox.)
5. Paste the URL into your RSS reader to set up the feed.

# How We Use Your E-mail Address

Checkpoint stores your e-mail address to allow you to receive newsletter e-mails and use other personalized Checkpoint services. Your e-mail address will never be distributed or shared without your permission. If your subscription allows access to any newsletters, you will be asked to define your newsletter preferences and subscribe to any available newsletters during Step 7 of the **New User Setup** process.

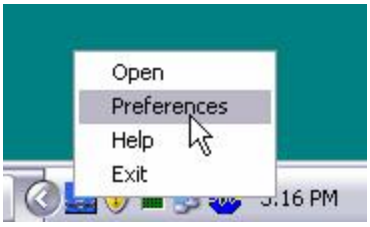
In addition, your e-mail address is used to notify you of new results from scheduled searches and to send a forgotten password. You can edit your e-mail address and password at any time in the Checkpoint **Options** screen.

**To access your Personal/Password options:**

1. Click **Options** on the top toolbar.
2. From the **Options** window, click **Personal/Password** on the left navigation bar.
3. Edit your personal information and password as needed.
4. Click **Save and Close**.

# Changing Your Speedlink Password

1. Right-click the **Speedlink** taskbar icon.




2. Click **Preferences** from the menu to access user preferences.
3. In the **Checkpoint Preferences** dialog box, enter the new password in the **Password** field.

4. Click the **Save** button to save the information, or click **Cancel** to exit without saving.

# About the Home Screen

When you click **Home** on the menu bar, Checkpoint displays a **Home** screen that is customizable for each user. Here you can customize a wide range of search tools and content links to best suit your Checkpoint usage and research needs.

You can use the **Current View** drop-down list to select a predefined view. Each view corresponds to a specialized set of tools for different users, including Accounting & Auditing, Corporate Finance, Estate & Retirement Planning, International, Payroll, Pension Compensation & Benefits, Standard, Tax, and All. The Standard view is the default. You can also create a custom view to add to the drop-down list.

Once you select your view, the **Home** screen displays content and search tools that alert you to new and important content updates or additions to your subscriptions. Examples of the content include the following.

| | |
|---|---|
| **My Quick Links** | Provides a set of customizable links to frequently used Checkpoint sources and locations. |
| **Assistance - Self-service, Support and Product Training** | Provides a set of links to product training, user guides, support contact information, and interactive guided tours. |
| **Today's Headlines** | Displays recent news headlines from the RIA Daily Update. You can view more available headlines from the News menu. |
| **New in My Subscription** | Displays new Checkpoint features and content that have been added to your subscription. Click the icon in each headline to view more information. |
| **New Law Alerts** | Displays critical new law updates that have been added to your subscription. Click the link to go directly to the new updated content. |
| **Track It** | Displays tracking results. |
| **Scheduled Searches** | Displays any scheduled search results. If you have set up scheduled searches, you can click the link to open the search results. |
| **Quick Search** | Provides a keyword search field that lets you enter key terms to define your search. You can also create and save source sets that let you search across practice areas in the same search. |

# Using the Home Menu and Home Screen

You click **Home** in the menu bar to access your **Home** screen in Checkpoint.

The **Home** screen provides a central location for reviewing new law alerts, tax news headlines, and the latest scheduled search results. You can see what new features and content have been added to your subscription as well as alerts to important news flashes.

Sometimes **Home** in the menu bar includes additional words or symbols to alert you to new content. The following table lists the words and symbols associated with the **Home** menu and **Home** screen.

| | |
|---|---|
| | The **Home** menu displays the word "NEW" when new content for your subscription has been added to the **Home** screen.<br><br>If you log in to Checkpoint using a normal login from the login screen, and there are new items in your subscription, Checkpoint automatically takes you to the **Home** screen, where you see the new content. |
| | The flash symbol on the **Home** menu indicates that there are new news flashes available for you to review in the Today's Headlines pane on the **Home** screen.<br><br>**Note**: You must have the News Flash option on the **News** screen selected for a specific newsletter or news service to have Checkpoint display News Flash updates on the **Home** or **News** screens. |
| | Whenever you click **Home** and there are new items to be viewed, Checkpoint includes a stop sign and summary about what is new near the top of the **Home** screen.<br><br>The stop sign image lets you know that you should take a look at the new content. This image appears only if you have been stopped on the **Home** screen during a normal login because you have new items to review. |
| | Whenever you manually access the **Home** screen from another screen, a warning image is displayed instead of the stop sign to alert you to the new content.<br><br> |

**Note**: When you access Checkpoint from an external link (using Speedlink or e-mail), you bypass the **Home** screen and go directly to the results of the external link—even when there are new items on the **Home** screen. However, you will always know when you have new content because you will see “New” on the **Home** menu.

# Creating a New Home Screen View

You can create a customized **Home** screen view and add the view as a choice in the **Current View** drop-down list.

**To create a new Home screen view:**

1. On the menu bar, click **Home**.

   The **Home** screen appears.

2. Next to the **Current View** field, click the **Manage my views** icon .
3. On the **Manage My Views** screen, in the left navigation bar, click **Create New View**.
4. Select the check boxes for the content panes you want to display in your custom view.
5. In the **Enter view name** field, enter the name for your new custom view.
6. Click **Save**.

You can now select your new view from the **Current View** drop-down list on the **Home** screen.

The **Home** screen always defaults to the last view selected. If you want your custom view to appear automatically on the **Home** screen every time you log in, simply leave it as the active view when you log off or go to another Checkpoint screen.

# Modifying the Home Screen View

You can modify the **Home** screen view by adding or removing content panes. You can also rearrange the layout of panes to any configuration you want.

### To modify the Home screen view:

1. On the menu bar, click **Home**.

   The **Home** screen appears.

2. Next to the **Current View** field, click the **Manage my views** icon .
3. On the **Manage My Views** screen, on the left navigation bar, click the view you want to modify.
4. Click the check boxes for the content panes you want to remove or add to the selected view.

   **Note**: For **predefined** views, you can only add or remove specific panes. Some of these panes (such as My Quick Links, Assistance - Self-service, Support & Product Training, New in My Subscription) cannot be removed from the view. The check boxes for these content panes are not available. For **customized** views, all content panes can be added or removed.

5. Click **Save** to store your changes.

   When you open the modified view, your new content panes are visible.

   **Note**: At the bottom of the predefined view screens, there is a link to restore the default view and layout. You just click the **Restore Defaults** link and then click **OK** to confirm the restore.

### To move a pane on the Home screen:

1. On the menu bar, click **Home**.

   The **Home** screen appears.

2. Determine which pane you want to move.
3. Using your left mouse button, click and hold the title bar of the pane you want to move.
4. Drag the pane to a new position.

   A dotted red outline shows the new position that the pane will snap to if you release the mouse button.

5. When you have the pane where you want it, release the mouse button to anchor the pane in the new position.

# Adding Quick Links Using the Quick Links Icon

On the **Home** screen, the **My Quick Links** pane contains links that provide easy access to your most frequently used features and content.

You can add links to the **My Quick Links** pane by using the quick links icon found next to features and content that are linkable in Checkpoint.

When you click this icon, a link to the associated feature or content is added to the **My Quick Links** pane.

**To add a link using the quick links icon:**

1. From any screen in Checkpoint, identify the Checkpoint content that you want to add to your **My Quick Links** pane.
2. Click the icon next to the content.

   The new selection is added to the **My Quick Links** pane.

**Note**: You can also modify the **My Quick Links** pane using the pane's edit feature. See Modifying My Quick Links.

# Creating External Quick Links

You can create an external quick link that can be used to go directly to specified Checkpoint content. An external link can be saved as a shortcut on your desktop or to a document such as an e-mail or a Microsoft® Word file.

**To create an external quick link:**

1. On the menu bar, click **Home**.

   The **Home** screen appears.

2. Create a quick link to the content you want to access (if a link does not already exist).

3. In the **My Quick Links** pane, click the **Edit** link.

4. On the **Edit My Quick Links** screen, click the permalink icon next to the quick link you want to access externally.

   **Note**: You can select quick links with or without check marks.

   The **External Quick Link** window appears.

5. Copy the quick link URL and paste it as a shortcut on your desktop or in a document.

6. Now you can click the external link on your desktop or in a document to go to the linked content in Checkpoint.

   **Note**: Checkpoint does not have to be open for an external quick link to access content in Checkpoint.

# Exporting Quick Links

You can import and export your Checkpoint quick links to and from an external file. This lets you conveniently access and share your quick links.

**To export quick links:**

1. On the menu bar, click **Home**.

   The **Home** screen appears.

2. In the **My Quick Links** pane, click the **Edit** link.
3. On the **Edit My Quick Links** screen, in the left navigation bar, click **Export Links**.

   **Note**: The export will include only those links with selected check boxes.

4. On the **Export** dialog box, click **Export**.

   **Note**: The export will include only those links with selected check boxes.

5. Click **Save**.
6. On the **Save As** dialog box, select the folder where you want to save the file.
7. In the **Save as type** drop-down list, click **HTML Document**.
8. Click **Save**.

# Modifying My Quick Links

The **My Quick Links** pane on the **Home** screen contains links to specific Checkpoint content. You can customize the **My Quick Links** pane by adding, renaming, moving, and deleting links.

### To modify My Quick Links:

1. Click the **Home** menu.

   The **Home** screen appears.

2. In the **My Quick Links** pane, click the **Edit** link.

   The **Edit My Quick Links** screen appears with **Add Links** as the default view.

3. In the **Select Quick Links From** drop-down list, select the Checkpoint area where the links you want to add are located.

   **Note**: The **Site Map** option lets you select from any Checkpoint area.

4. Click the **+** symbol to expand the nodes (if necessary) and select the check boxes for the links you want to add.

5. Click **Save** to save the new links to the **My Quick Links** pane.

   **Note**: Quick links can also be added using the Quick Link icon from anywhere in Checkpoint.

### To organize My Quick Links:

1. Click the **Home** menu.

   The **Home** screen appears.

2. In the **My Quick Links** pane, click the **Edit** link.

3. On the **Edit My Quick Links** screen, in the left navigation bar, click **Organize Links**.

   The **Organize Quick Link Display** view lists the current links and provides controls to move, rename, and delete the links.

| | |
|---|---|
| To **move** a link… | Select the link and click **Move Up** or **Move Down**. |
| To add **spaces** to the link list… | Place the cursor in the list just below where you want a break and click **Spacer** as many times as you want spaces. All spaces are added above your cursor. |
| To **rename** a link… | Select the link and click **Rename**. Type the new name and click **OK**. |
| To **delete** spaces or links… | Select the link or the extra spaces and click **Delete**. To confirm the deletion, click **OK**. |

4. After you complete the changes to the **My Quick Links** pane, click **Save**.

**Note**: To create category names for your Quick Links (such as Tax or A&A), you can rename a spacer that you have added.

# Importing Quick Links

You can import and export your Checkpoint quick links to and from an external file. This lets you conveniently access and share your quick links.

**To import quick links:**

1. On the menu bar, click **Home**.

   The **Home** screen appears.

2. In the **My Quick Links** pane, click the **Edit** link.

3. On the **Edit My Quick Links** screen, in the left navigation bar, click **Import Links**.

   **Note**: You can import only html files that were previously exported from Checkpoint using the Export Quick Links feature.

4. Click **Browse** next to the **Upload file** field.

5. In the **Choose File to Upload** dialog box, select the file to import, and click **Open**.

   The file to import appears in the **Upload file** field.

6. Select either **Replace** or **Merge**.

   **Note**: Merge adds imported quick links to your existing list, while Replace overwrites existing quick links with the imported list.

7. Click **Import**.

   The confirmation screen lists the files to be imported along with a warning message about replacing or merging your existing quick links.

8. Click **Confirm** to complete the import.

# Accounting, Audit & Corporate Finance Sources

A PDF (portable document format) listing of the available Accounting, Audit & Corporate Finance sources is available when you click this link. You must have Adobe Acrobat Reader installed on your computer to view and print the source listing. Acrobat Reader is distributed by Adobe Corporation. You can download the latest version from the Adobe Web Site at http://get.adobe.com/reader/.

**To view or print the source listing:**

1. Click this link.

   The Acrobat Reader launches and displays the source listing.

2. On the **File** menu in Acrobat Reader (the toolbar displayed directly above the source listing), click **Print**.

   **Alert:** You must use the print function in Acrobat Reader.

# Estate Planning Sources

A PDF (portable document format) listing of the available estate planning sources is available when you click this link. You can view or print the document. You must have Adobe Acrobat Reader installed on your computer to view and print the source listing. Acrobat Reader is distributed free by Adobe Corporation. You can download the latest version from the Adobe Web Site at http://get.adobe.com/reader/.

**To view or print the source listing:**

1. Click this link.

   The Acrobat Reader launches and displays the source listing.

2. On the **File** menu in Acrobat Reader (the toolbar displayed directly above the source listing), click **Print**.

   **Alert:** You must use the print function in Acrobat Reader.

# Federal Sources

A PDF (portable document format) listing of the available federal sources is available when you click this link. You can view or print the document. You must have Adobe Acrobat Reader installed on your computer to view and print the source listing. Acrobat Reader is distributed free by Adobe Corporation. You can download the latest version from the Adobe Web Site at http://get.adobe.com/reader/.

**To view or print the source listing:**

1. Click this link.

   The Acrobat Reader launches and displays the source listing.

2. On the **File** menu in Acrobat Reader (the toolbar displayed directly above the source listing), click **Print**.

   **Alert:** You must use the print function in Acrobat Reader.

# International Tax Sources

A PDF (portable document format) listing of the available international sources is available when you click this link. You can view or print the document. You must have Adobe Acrobat Reader installed on your computer to view and print the source listing. Acrobat Reader is distributed free by Adobe Corporation. You can download the latest version from the Adobe Web Site at http://get.adobe.com/reader/.

**To view or print the source listing:**

1. Click this link.

   The Acrobat Reader launches and displays the source listing.

2. On the **File** menu in Acrobat Reader (the toolbar displayed directly above the source listing), click **Print**.

   **Alert:** You must use the print function in Acrobat Reader.

# Pension & Benefits and Payroll Sources

## Pension & Benefits

A PDF (portable document format) listing of the available pension & benefits sources is available when you click this link. You can view or print the document. You must have Adobe Acrobat Reader installed on your computer to view and print the source listing. Acrobat Reader is distributed free by Adobe Corporation. You can download the latest version from the Adobe Web Site at http://get.adobe.com/reader/.

**To view or print the Pension & Benefits source listing:**

1. Click this link.

   The Acrobat Reader launches and displays the source listing.

2. On the **File** menu in Acrobat Reader (the toolbar displayed directly above the source listing), click **Print**.

   **Alert:** You must use the print function in Acrobat Reader.

## Payroll

A PDF (portable document format) listing of the available payroll area sources of the is available when you click this link. You can view or print the document. You must have Adobe Acrobat Reader installed on your computer to view and print the source listing. Acrobat Reader is distributed free by Adobe Corporation. You can download the latest version from the Adobe Web Site at http://get.adobe.com/reader/.

**To view or print the Payroll source listing:**

1. Click this link.

   The Acrobat Reader launches and displays the source listing.

2. On the **File** menu in Acrobat Reader (the toolbar displayed directly above the source listing), click **Print**.

   **Alert:** You cannot print the source listing using the Print command or the Print button in your browser.

# State & Local Sources

A PDF (portable document format) listing of the available state & local sources is available when you click this link. You can view or print the document. You must have Adobe Acrobat Reader installed on your computer to view and print the source listing. Acrobat Reader is distributed free by Adobe Corporation. You can download the latest version from the Adobe Web Site at http://get.adobe.com/reader/.

**To view or print the source listing:**

1. Click this link.

   The Acrobat Reader launches and displays the source listing.

2. On the **File** menu in Acrobat Reader (the toolbar displayed directly above the source listing), click **Print**.

   **Alert:** You must use the print function in Acrobat Reader.

# Tax News Alert Sources

The following Tax News Alert sources are available in Checkpoint:

**BNA Daily Tax Report™**

- Highlights
- Also in the News
- Tax, Budget & Accounting
- State Taxes
- Tax Rulings & Decisions
- Calendar
- Table of Cases

**WG&L Journals**

- Journal of Taxation
- Practical Tax Strategies
- Estate Planning Journal
- Journal of Multistate Taxation and Incentives
- Journal of International Taxation

**RIA Advance Documents**

- Advance Citator
- Advance Code Arranged Annotations
- Advance Federal Regulations

# International Trade Library Sources

A PDF (portable document format) listing of the available International Trade Library sources is available when you click this link . You can view or print the document. You must have Adobe Acrobat Reader installed on your computer to view and print the source listing. (Acrobat Reader is distributed free by Adobe Corporation.) You can download the latest version from the Adobe website at http://get.adobe.com/reader/.

**To view or print the source listing:**

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2. On the **File** menu in Acrobat Reader (the toolbar displayed directly above the source listing), click **Print**.

   **Alert:** You must use the print function in Acrobat Reader.

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# Introduction to Searching

Conducting research is one of Checkpoint's primary activities. The goal is to find the information you need from Checkpoint's taxation and financial sources as quickly and efficiently as possible. You will find searching features available in several locations in Checkpoint, including:

- **Search** screen
- **Home** screen
- **Table of Contents** screen
- **Site Navigator** feature on the menu bar

## Search Screen

The primary screen for searching in Checkpoint is the **Search** screen. When you log in to Checkpoint, the **Home** screen is the default. If you want to make your **Search** screen the default, you can do so in General Settings.

To access the **Search** screen from any other screen in Checkpoint, click **Search** in the menu bar.

On the **Search** screen, you can use several methods for performing searches of Checkpoint's sources.

| | |
|---|---|
| Keyword search | Submit the words or phrases that best describe your research topic using either an Intuitive search or Terms & Connectors method. You can also use the Thesaurus/Query Tool for advanced search functions. |
| Find by Citation | Locate a specific law, ruling, or case by typing its citation. |
| Data Range search | Locate Federal rulings or cases in a specified date range. |
| Legislation search | Search for current or prior legislation by topic, year, code, or section. |
| WG&L Tax Dictionary | Search for definitions and explanations in a reference guide to key taxation terminology. |
| Find Sources | Filter the selected source sets to narrow the number of sources to search by typing the beginning letters or words into the this field. |

After completing a search on the **Search** screen, the results are displayed on the **Search Results** screen.

## Home Screen

You access the **Home** screen by clicking the **Home** menu from any screen in Checkpoint.

This screen's **Quick Search** feature provides a keyword search field that lets you perform searches using Intuitive search or Terms & Connectors. You can also create and save customized source sets that let you search across practice areas in the same search. You can run these customized source sets directly from the **Home** screen.

After completing a search on the **Home** screen, the results are displayed on the **Search Results** screen.

## Table of Contents Screen

You access the **Table of Contents** screen by clicking the **Table of Contents** menu from any screen in

Checkpoint.

You can enter search keywords in the **Keyword** field at the top of the screen just as you do with Checkpoint's **Search** screen. The only difference is that you are searching specific areas of the Table of Contents. You can also use the Thesaurus/Query Tool feature for advanced search function.

The results of a search on the **Table of Contents** screen are displayed on the **Search Results** screen.

### Site Navigator

You can click the menu bar's Site Navigator feature from any screen in Checkpoint to quickly find and display resources in Checkpoint.

# About Keyword Searching

You perform a keyword search using the **Keywords** field, which is found on several screens in Checkpoint, including the **Search** screen, **Home** screen, and **Table of Contents** screen.

Checkpoint's keyword search functionality lets you:

- Type the keyword terms that best describe your research issue.
- Select from two search methods: Intuitive Search or Terms & Connectors.
- Create your own customized source sets.
- Use a Thesaurus/Query Tool to include synonyms in your search.
- Use search syntax to increase the effectiveness of your search.
- Indicate how you would like to view the results of your search.

**Note**: In contrast to keyword searching, citation searching is intended for when you know the location of the information you want to retrieve, or are looking for a specific federal code section, state statute, case decision, or revenue ruling.

# Search AutoComplete

The search AutoComplete feature generates suggested search terms as you type in the **Keyword Search** field on the Search screen. Suggested terms are generated using the most popular matching terms from all Checkpoint user searches and your personal search history.

To use AutoCompletion simply go to the **Search** screen, select your Practice Area and sources and begin typing in the Keyword field. A list of suggested search terms will begin to automatically display beneath the search field. This list will update as you continue typing to reflect terms matching your input. The list is broken into two sections, *Previous Keywords* and *Suggested Keywords*. The *Previous Keywords* list displays matching terms from your personal search history while *Suggested Keywords* shows the most popular matching terms from all Checkpoint users.

Search AutoCompletion can be toggled on and off from the Search/Display Options screen.

# Performing a Keyword Search

You perform a keyword search using the **Keywords** field, which is found on several screens in Checkpoint, including the Search screen, Home screen, and Table of Contents screen.

### To perform a keyword search on the Search screen:

1. On the menu bar, click the **Search** menu.

   The **Search** screen appears with the default view of **Keyword Search**.

2. On the left navigation bar, click the **Practice Area** drop-down list.

3. Select the practice area that you want to search. (Federal is the default.)

   The selected practice area displays its associated source sets on the right. Your subscription determines which of these source sets you can access.

   **Note**: If you select the State & Local practice area, you will need to select the appropriate state(s) and click Next.

4. Select the check boxes next to the sources that are applicable for your search.

   **Note**: If you want to select an entire source set, click the check box next to the source set name (such as Editorial Materials).

5. Enter your search terms in the **Keywords** field.

6. Select either the Intuitive Search or Terms & Connectors method to perform the search.

7. Use the Thesaurus/Query Tool feature as necessary.

8. Click **Search**.

   The **Search Results** screen appears.

### To perform a keyword search on the Home screen:

1. On the menu bar, click the **Home** menu.

   The **Home** screen appears.

2. In the **Quick Search** pane, enter your search terms in the **Keywords** field.

3. Select either the Intuitive Search or Terms & Connectors method to perform the search.

4. Use the Thesaurus/Query Tool feature as necessary.

5. Click **Search**.

   The **Search Results** screen appears with the Source List view as the default.

**Note**: In the **Quick Search** pane, you can also select a pre-defined source set from the **Choose Source Set** drop-down list and click **Search** to perform a search of the pre-defined sources.

**To perform a keyword search on the Table of Contents screen:**

1. On the menu bar, click the **Table of Contents** menu.

   The **Table of Contents** screen appears.

2. Select the check boxes next to the sources you want to search.
3. Enter your search terms in the **Keywords** field.
4. Select either the Intuitive Search or Terms & Connectors method to perform the search.
5. Use the Thesaurus/Query Tool feature as necessary.
6. Click **Search**.

   The **Search Results** screen appears.

# Performing a Citation Search

Use Checkpoint's pre-designed citation search templates to search for specific types of tax information. For example, with citation searching, you can retrieve a specific federal code section, state statute, case decision, or revenue ruling.

In contrast to keyword searching, citation searching is intended for using a specific citation.

The International practice area includes a separate customized template for retrieving Tax Treaty information.

The State and Local practice area features a state template that guides you through its search templates.

**To perform a citation search:**

1. On the menu bar, click the **Search** menu.

   The **Search** screen appears.

2. On the left navigation bar, select a practice area from the **Practice Area** drop-down list.

3. On the left navigation bar, click **Find by Citation**.

   **Note**: If you selected the State & Local practice area, you will need to select the appropriate state(s) and click Next.

4. Under **Find by Citation**, click the citation type you want to search (such as Cases).

   The selected citation template appears.

5. Follow the examples provided on the template to enter the appropriate citation format.

6. On some templates, you may have the option to enter keywords in the **Keywords** field for a more focused search.

7. Click **Search**.

   Citation search results are displayed on the Document screen.

# Performing a Date Range Search

Use the Date Range search feature to locate Federal rulings or cases in a specified date range. Date Range Search is available from the Federal, State & Local, Estate Planning, International, and Pension & Benefits practice areas.

**To perform a date range search:**

1. On the menu bar, click the **Search** menu.

   The **Search** screen appears.

2. On the left navigation bar, select a practice area from the **Practice Area** drop-down list.
3. On the left navigation bar, click **Date Range Search**.

   **Note**: If you selected the State & Local practice area, you will need to select the appropriate state(s) and click Next.

4. Under **Date Range Search**, click the appropriate template for the state selected (for example Cases by Court or Rulings by Date).
5. Complete the template by selecting the check boxes for the cases or rulings you want to search.
6. Enter a date range in the **Select Date Range** fields, or use the calendar feature to select the dates.
7. On some templates, you may also have the option to enter keywords in the **Keywords** field to help focus the search results.
8. Click **Search** to execute the search and view the results.

# Performing a Legislation Search

Use Checkpoint's Legislation Search to search for current or prior legislation by topic, year, code, or section.

**To search for current or prior legislation:**

1. On the menu bar, click the **Search** menu.

   The **Search** screen appears.

2. On the left navigation bar, select a practice area from the **Practice Area** drop-down list.
3. On the left navigation bar, click **Legislation Search**.
4. Under **Legislation Search**, select the **current** year (default) or a **previous** year you would like to search.
   - If you select current year, the current year legislation resources appear.
   - If you select a prior year, the legislation resources associated with that year appear.
5. Click one or more check boxes next to the information you want to retrieve (such as Full Text of Committee Reports). You can also click **Select All** to select all current legislation topics or **Deselect All** to clear the check boxes.
6. On some templates, you may also have the option to enter keywords in the **Keywords** field for a more focused search. Select either the Intuitive Search or Terms & Connectors method to use for the search.
7. You can also search by Code Section or Act Section by entering the relevant numbers in the **Search by** or **Retrieve Document by Citation** fields.
8. Click **Search** to execute the search and view the results.

# Performing an Intuitive Search

When you perform a keyword word search, you must select either Intuitive Search or Terms & Connectors as the search method.

Checkpoint's Intuitive Search recognizes if you enter a sentence, terms & connectors, or a citation and interprets your query to return the most relevant results for the terms you entered. It takes advantage of historical usage data, giving higher importance to documents that are frequently accessed by your peers, as well as our editorial know-how embedded within the content. It helps you find what you need to find, without being an expert on the topic or the search engine.For example, you could enter:

**Can I deduct landscaping expenses for my home office?**

The search returns a list of results (up to a maximum of 2000) that are the most relevant to that search phrase. Relevance is determined by an algorithm that weighs factors such as the number of keywords from the search phrase found in a document and the proximity of those keywords to each other.

**Note**: You have the option on all views to display or remove the display of the Best section (the most relevant section), which is displayed in green text.

You can perform an Intuitive Search from any screen that has a **Keywords** field. In this example, you will use the **Search** screen.

**To perform an Intuitive Search:**

1. On the menu bar, click the **Search** menu.

   The **Search** screen appears with **Keywords search** as the default view.

2. On the left navigation bar, select a practice area from the **Practice Area** drop-down list.
3. Select the appropriate check boxes from the source sets. If you want to select an entire source set, click the check box next to the source set name (such as Editorial Materials).
4. You can also select a custom source set from the **Choose Sources from** drop-down list.
5. Select the **Intuitive Search** option below the **Keywords** field.
6. Type your search phrase in the **Keywords** field. Checkpoint's Intuitive Search technology automatically recognizes if you enter a sentence, terms & connectors, or a citation and interprets your query accordingly.
7. You can also click the **Thesaurus/Query Tool** link to access these advanced search functions:

   - Click **Tools** to access the **select from previous keywords** list that lets you choose one of the last 10 queries you have used.
   - Click **Thesaurus** to generate a list of synonyms that appear in the sources you are searching. Click the synonyms you would like to include in the search. To automatically include all synonyms, click the **Include all alternatives in query** link.

- Click **Spelling** to run a spelling check on the query.
- Click **Restrictions** to refine your search by requiring or excluding words from the current query.

8. Click **Search** to execute your search.

   The search results appear in the format determined by your Options search/display settings.

9. When you are finished, you can click the **Clear All** link to remove keywords from the field, clear selected sources, and return to the default Search settings.

# Performing a Terms & Connectors Search

When you perform a keyword search, you must select either Terms & Connectors or Intuitive Search as the search method.

A Terms & Connectors search lets you search for documents by specifying words and phrases that describe your research question, along with specialized search connectors to filter and customize the search to get more specific results.

You can perform a Terms & Connectors search from any screen that has a **Keywords** field. In this example, you will use the **Search** screen.

### To search using Terms & Connectors:

1. On the menu bar, click the **Search** menu.

   The **Search** screen appears with **Keywords search** as the default view.

2. On the left navigation bar, select a practice area from the **Practice Area** drop-down list.
3. Select the appropriate check boxes from the source sets. If you want to select an entire source set, click the check box next to the source set name (such as Editorial Materials).
4. You can also select a custom source set from the **Choose Sources from** drop-down list.
5. Click the **Terms & Connectors** option below the **Keywords** field.
6. Type your search phrase in the **Keywords** field using terms and search connectors language. Terms can be a complete sentence, phrase, question, or list of keywords, up to 500 characters in length.

   **Note**: When you type more than one keyword in the **Keywords** field, by default Checkpoint interprets this as implying the "AND" search operator. It retrieves all documents that include at least one occurrence of each of the terms you typed. For more information, see Using Search Connectors and Using Search Examples.

7. You can also click the **Thesaurus/Query Tool** link to access these advanced search functions:
   - Click **Tools** to access the **select from previous keywords** list that lets you choose one of the last 10 queries you have used.
   - The **Tools** link also lets you access a special search connectors syntax to help you refine your search. Choose a search connector from the **Connectors** list and click **Append**.
   - Click **Thesaurus** to generate a list of synonyms that appear in the sources you are searching. Click the synonyms you would like to include in the search. To automatically include all synonyms, click the **Include all alternatives in query** link.
   - Click **Spelling** to run a spelling check on the query.

8. Click **Search** to start your search.

Once the search is complete, your results appear in the format determined by your search/display settings.

9. When you are finished, you can click the **Clear All** link to remove keywords from the field, clear selected sources, and return to the default Search settings.

**To search with section symbols and alternatives:**

You can search for a specific section by entering the section symbol § and equivalent alternatives in the **Keywords** field. For example, the following search terms produce the same result:

- §1.1502-13
- s1.1502-13
- sec1.1502-13
- section1.1502-13

**Note**: To enter a § symbol, hold the **Alt** key while typing **0167** on the **numeric keypad** of your keyboard.

If you are searching for a section, it is also useful to use the section number by itself, the "OR" search connector ("|"), and the section number and symbol.

For example, use **1.1502-14 | s1.1502.14** instead of **1.1502.14 or s1502.14**.

**Note**: When searching for multiple sections, **§§**, **ss,** and **sections** are interchangeable and produce equivalent results.

# Performing a Search in the BNA Daily Tax Report™

Checkpoint provides a tool to perform a search in the BNA Daily Tax Report.

**To search the BNA Daily Tax Report:**

1. On the menu bar, click the **Search** menu.

   The **Search** screen appears.

2. On the left navigation bar, click **Find by Citation**.
3. Under **Find by Citation**, click **More**.
4. From the list of sources, click **BNA Daily Tax Report & TaxCore**.

   The **BNA Daily Tax Report and Tax Core** template appears.

5. Enter the appropriate search criteria in the template fields.

| | |
|---|---|
| **Section Name** | Retrieves items from the Table of Contents headings (such as Tax, Budget, Accounting; Tax Rulings & Decisions). |
| **Topic/Title** | Retrieves items from the next-level heading under the Section name (such as Tax Legislation, Accounting, Agriculture) or the next-level heading under the Topic name, which is the article or summary heading. |
| **Case Name** | Retrieves items wherever the case is mentioned in text. |
| **Author** | Retrieves items wherever the author's name is listed in the byline. |
| **Issue Date** | Retrieves items from the Daily Tax Report issue of that date (not the date the information was issued by the court or agency). |
| **Select a State** | Retrieves items categorized under the selected state. (This field contains a drop-down list of all states.) |
| **Keywords** | Retrieves items with specified text that appears anywhere in Daily Tax Report documents. |

**Note**: When you type more than one keyword in the **Keywords** field, by default Checkpoint interprets this as implying the "AND" search operator. It retrieves all documents that include at least one occurrence of each of the terms you typed. For more information, see Using Search Connectors and Using Search Examples.

6. Select either Intuitive Search or Terms & Connectors.
7. You can click the **Thesaurus/Query Tool** link to access the following advanced search functions:

   - Click **Tools** to access the **select from previous keywords** list that lets you choose one of the last 10 queries you have used.
   - The **Tools** link also lets you access a special search connectors syntax to help you refine your search. Choose a search connector from the **Connectors** list and click **Append**.

- Click **Thesaurus** to generate a list of synonyms that appear in the sources you are searching. Click the synonyms you would like to include in the search. To automatically include all synonyms, click the **Include all alternatives in query** link.
- Click **Restrictions** to refine your search by requiring or excluding words from the current query.

8. Click **Search** to start your search.

   Once the search is complete, the results appear in the format determined by your **Options** screen settings.

9. You can click the **Clear All** link to remove keywords from the field, clear selected sources, and return to the default Search settings.

# Performing a United States Tax Reporter (USTR) Code Search

Checkpoint provides a tool to search for specific United States Tax Reporter (USTR) code references in the **Federal** practice area.

**To search for specific USTR code references:**

1. On the menu bar, click the **Search** menu.

   The **Search** screen appears.

2. On the left navigation bar, click the **Practice Area** drop-down list, and then click **Federal**. (Federal is the default view.)

3. On the left navigation bar, under **Go To**, click **USTR Code Section**.

   The **Table of Contents** screen appears with the **USTR Code Section** template view.

   **Note**: You can also access the USTR search template from the **Table of Contents** screen by clicking the link under the Jump To heading on the left navigation bar.

4. Select the USTR tax type from the three options: **Income**, **Estate & Gift**, or **Excise**.

5. Select either **Current** or **Repealed** code.

6. Enter the **Code Section** number for which you want to search.

7. Click **Go to USTR**.

   Checkpoint displays the USTR search results.

# Using the Site Navigator

Checkpoint's Site Navigator feature provides a quick way to find various sources and documents within Checkpoint. When you enter search criteria in the **Site Navigator** field on the menu bar, Checkpoint searches through its extensive reference content and returns a list of matching results, up to 20 links at a time. The links are organized into sections with menu headers, such as Search, Table of Contents, and Tools.

Site Navigator search criteria conventions include the following:

- Upper or lower case letters (case does not matter)
- Single or multiple words
- Letters within words (for example, entering "ap por" would find "GAAP Reporter")

**To run a Site Navigator search from any screen in Checkpoint:**

1. On the menu bar, click the **Site Navigator** field.
2. Enter the words or phrases of your search criteria. You do not need to press or click anything to start the search.

   Checkpoint automatically builds and displays a list of up to 20 items that include your search term, such as templates, tools, and Table of Content titles.
3. Scroll through the list and click the document or feature you want to access.
4. To see the complete list of search results, click **View All Results** at the bottom of the list.

# Understanding Source Selection on the Search Screen

To perform a search on the **Search** screen, you first select a practice area from the **Practice Area** drop-down list. Once you select the practice area, Checkpoint displays the corresponding source sets. You can also search across multiple practice areas by customizing and saving your own source sets. Customizing source sets can save you time and increase your searching efficiency.

**To view the available sources in a source set:**

1. On the menu bar, click the **Search** menu.

   The **Search** screen appears.

2. On the left navigation bar, select a practice area from the **Practice Area** drop-down list.

   The source sets for the selected practice area appear on the right of the screen.

   Click here to see example source sets.

Choose Sources from: All Federal
Save
Editorial Materials
Citator 2nd (RIA)
Elections & Compliance Statements (RIA)
Federal Tax Handbook (RIA)
Federal Tax Coordinator (RIA)
Form/Line Finders (RIA)
PPC's Federal Tax Compliance Library
PPC's Tax and Financial Planning Library
Quick Reference and Preparation Tools (PPC)
Tables & Rates (RIA)
Tax Advisors Planning System (RIA)
Tax Alerts (RIA)
Tax Planning and Practice Guides (Special Studies) (RIA)
Primary Source Materials
Internal Revenue Code, Treasury Regulations, Committee Reports (RIA)
Current Pending/Enacted Legislation (RIA)
Federal Tax Cases (RIA)
IRS Practice (RIA)
IRS Publications (RIA)
IRS Rulings and Releases (RIA)
U.S. Tax Treaties in Force (RIA)
Legislation (Editorial Analysis and Source Material)
Complete Analysis of the Tenth Latest 2011 Tax Legislation
Complete Analysis of the Ninth Latest 2011 Tax Legislation

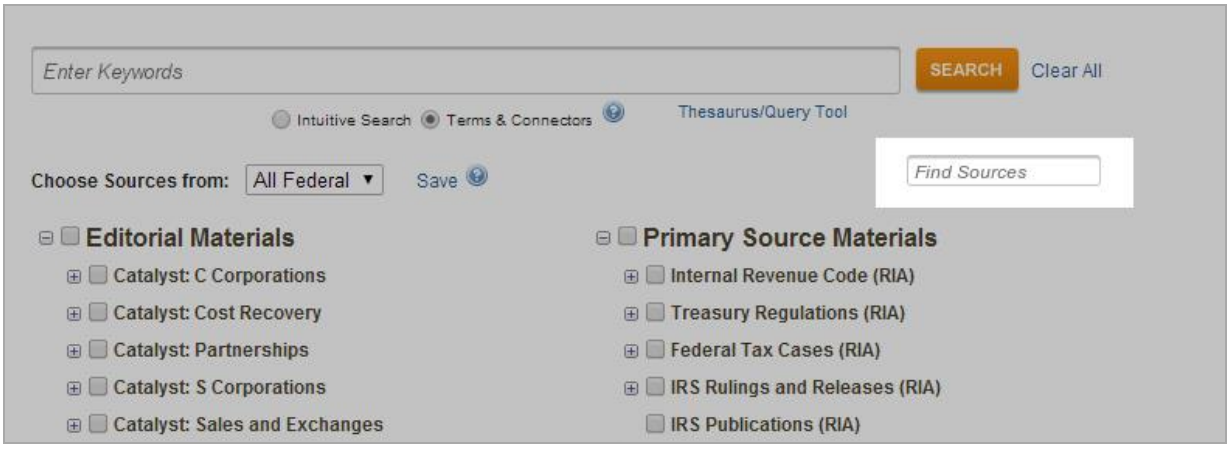
3. Click the ⊞ symbol to expand a source set to display its sources.
4. You can select as many sources from a source set as you need for your search. Simply click the corresponding check box next to each source.
5. To select an entire source set, click the check box next to the source set name (such as Editorial Materials).
6. After completing the source set selection and entering any keywords (optional) or thesaurus terms (optional), you can either click **Search** to start the search or click **Save** to save a customized source set.

**Note**: When you hover your mouse pointer over a source on the **Search** screen, an icon appears that you can click to view the source expanded in the Table of Contents hierarchy in a preview window. This feature is available for all practice areas.

# Using the Find Sources Tool

The **Find Sources** tool is a field on the **Search** screen that lets you easily find specific sources by typing a few letters or terms contained within the source.

Click here to see a graphic of the **Find Sources** field.




**Using the Find Sources tool to filter sources:**

1. On the **Search** screen, click in the **Find Sources** field.
2. Begin typing the letters or terms associated with the source or sources you want to find.

   Checkpoint filters the sources based on what you type, eliminating sources that do not match.

   **Note**: All previously selected sources remain visible on the **Search** screen, regardless of the letters or terms you enter in the **Find Sources** field.

3. Once you have filtered down your sources, select the appropriate check boxes and click **Search**.

For a complete discussion of source selection, see Understanding the Source Selection Screen.

# Linking from Source Selection to the Table of Contents

When you are selecting sources on the **Search** screen, you may need to know more information about where a source is found in the **Table of Contents** hierarchy. Checkpoint provides a means to help you link these two resources so you can make a comparison.

**To view a Search screen source in the Table of Contents hierarchy:**

1. On the **Search** screen, hover your mouse pointer over a source.

   Checkpoint displays the icon at the end of the source name.

2. Click the icon.

   Checkpoint displays a **Table of Contents** preview window showing the location of the source within the TOC hierarchy.

   > **Note**: If you click the **Maximize** button in the upper-right of the preview window, Checkpoint takes you to the **Table of Contents** screen displaying the same information

3. When you are finished reviewing the preview window, click the **X** in the upper-right corner to close it.

For a complete discussion of source selection, see Understanding the Source Selection Screen.

# Creating and Saving a Customized Source Set

Generally, your searches are confined to a specific practice area, such as Federal. When selected, the practice area displays predefined source sets (such as Editorial Materials, Federal Tax Coordinator, Tax Desk, IRS Publications, or Primary Source Material), and one or more of these will be the focus of your search.

You can also search across practice areas. For example (depending on your subscription), you can select source sets from both the Federal and State & Local practice areas for the same search. To do this, you create a customized source set.

**To create and save a customized source set:**

1. On the menu bar, click the **Search** menu.

   The **Search** screen appears.

2. On the left navigation bar, click the **Practice Area** drop-down list, and then click **All Practice Areas**.
3. Select the check boxes for the sources you want to include.
4. Click the **Save** link next to the **Choose Sources from** drop-down list.
5. In the pop-up window, enter a name for the saved list and click **OK**.

   The saved source set is added to the **Choose Sources from** list.

6. If necessary, you can delete, rename, or modify a source set.

   - To remove a source set from the list, make the source set active, and then click **Delete**.
   - To rename a source set, make the source set active, and then click **Rename**.
   - To modify a source set, select the appropriate practice area, and then select the check boxes for new sources. You can either save the modified set with a new name or save as the old name and overwrite the old source set.

**Note**: You can also create and save a customized source using the **Quick Search** pane on the **Home** screen.

# Using Search Connectors

On any Checkpoint screen that has a **Keywords** field, you can enter search terms and phrases along with search connectors to filter and customize the search to get more specific results.

When your research tasks demand more complex analysis, using plain keywords may not allow you to specify your search topic precisely. Checkpoint lets you use advanced search syntax, such as connectors, to perform more sophisticated and focused searches.

Search connectors are symbols and words you can use in conjunction with keywords to qualify their relationships and meaning. See below for a list of search connectors and examples of how you can incorporate them into your search. Click Search Tips, Search Examples, and Using Wildcards for more information.

**Note**: For a precise query use the connectors in the below table. These work best if you know exactly what you are searching for.

### Search Connectors

| To locate documents: | Use: | Example: |
|---|---|---|
| containing any of my keywords | OR, \| | funding OR deficiency |
| containing all of my keywords | space, &, AND | funding & deficiency |
| that contain one keyword but exclude another | ^, NOT | funding ^ deficiency |
| containing my exact phrase | " " | "funding deficiency" |
| containing variations of my keywords | * (asterisk) | deprecia* |
| disabling automatic retrieval of plurals and equivalencies | # (pound sign) | #damage (retrieves only damage, not damages) |
| containing single-character variations | ? (question mark) | s????holder (retrieves stockholder, shareholder) |
| containing compound words | - (hyphen) | e-mail (retrieves e-mail, e mail, email) |
| containing terms that occur at least # times | atleast#() | atleast5(customer) |

**Note**: The **#** character does not turn off the automatic retrieval of possessives (for example, customer's).

## Using Connectors in Intuitive Search

If the Terms & Connectors search method is selected, the AND, SPACE, or & connectors can all be used to require more than one term in each of the documents of your search results. However, if Intuitive Search is left as the default search method, Checkpoint will read the word "AND" and any SPACE as it would any other word used in your query. Although the most relevant documents are likely to have all words used, you may get results that have only most of the words.

Also, when using the Intuitive Search method, the use of quotations to search for a phrase will find the most relevant documents that include the exact phrase and relevant variations that contain the keywords within 3 words of one another.

| To search for a word or phrase: | Use: | Example: |
|---|---|---|
| within n words of another (in any order) | /# (where # equals number) | "disclosure exception" /7 negligence |
| within n words of another (in exact order) | pre/# (where # equals number) | "disclosure exception" pre/7 negligence |
| within the same sentence (20 words) as another (in any order) | /s | "disclosure exception" /s negligence |
| within the same sentence (20 words) as another (in exact order) | pre/s | "disclosure exception" pre/s negligence |
| within one paragraph (50 words) as another (in any order) | /p | "disclosure exception" /p negligence |
| within one paragraph (50 words) as another (in exact order) | pre/p | "disclosure exception" pre/p negligence |

**Note**: Because Checkpoint uses the characters * and / as search connectors, you cannot search for them as you would for other text or characters. If you include these characters in parentheses, they still function as search connectors.

### Multiple Search Connectors

You can also use multiple search connectors when constructing a search string. For example, this search string contains three separate phrases – “partner deduct*”, “excise tax”, and “income tax”. The first phrase must be found within the same paragraph as the second phrase, and also includes an asterisk (“*”) in one of the terms to indicate that any variation of that term is acceptable (e.g., deduct, deduction, deductible, deductibility, etc). However, a document containing this relationship should be excluded if it also contains the phrase “income tax”.

**("partner deduct*" /p "excise tax") ^ "income tax"**

### Wildcard Characters

Wildcard characters act as placeholders that can represent a single character, multiple characters, or an entire word.

When you attach a wildcard to your search terms, Checkpoint retrieves documents that contain either the keywords themselves or variations of your keywords as determined by the type of wildcard you use. See Using Wildcards for examples.

### Phrases

When searching using a phrase, the phrase should be surrounded with quotation marks. If the phrase has common words in it (e.g. of, as, a, the) a pound sign (#) should be put in front of them. So "software #as #a service".

### Connector Precedence Rules

When a keyword search contains more than one type of connector, precedence rules affect which documents are retrieved by the search.

| Precedence Rule | Example |
|---|---|
| Keyword connectors are processed according to a precedence sequence in which **OR, \|** has the highest precedence (and thus, is processed first) and **^** has the lowest precedence (and thus, is processed last). | **\|, PRE/#, PRE/S, PRE/P, /#, /S, /P, & (space), ^**<br><br>Where # is a number between 1 and 255. |
| Precedence rules can be overridden when parentheses are used to construct a query. | **(funding & deficiency) \| bankruptcy**<br><br>Since **\|** has higher precedence than **&**, **\|** would normally be processed first. However, with the use of parentheses, the **&** operator would be processed before the **\|** operator. |
| Note that some uses of parentheses to override precedence rules are considered illegal and are reported as a search error. This example would cause a search error. | **(income ^ tax) /p corporate** |

# Using Search Connectors Examples

Connectors define relationships between keywords to narrow or expand the scope of your search. See the examples in the following table for when and how to use search connectors.

| To: | Use: | Examples: |
|---|---|---|
| Search for all keywords | & | Searches for documents containing at least one instance of each of your keywords. No restriction on proximity or location of words in relation to each other.<br><br>**Example**: funding & deficiency<br><br>**Finds**: documents containing both search terms: funding **and** deficiency. |
| Search for any keywords | \|, OR | Searches for documents containing at least one instance of either of your keywords.<br><br>**Example**: reimbursement \| proceeds; reimbursement OR proceeds<br><br>**Finds**: documents containing either or both words: reimbursement **or** proceeds. |
| Exclude keywords | ^ | Searches for one keyword but not when the other keyword appears in the document.<br><br>**Example**: deferred & compensation ^ pension<br><br>**Finds**: documents containing the keywords: deferred **and** compensation, but **not** when pension appears in the document. |
| Search for phrase and variations | " " | Searches for the given terms in the order presented - phrase search.<br><br>**Example**: "partnership deduction"<br><br>**Finds**: documents containing the phrase partnership deduction **and** variations. |
| Search for an exact phrase | "" and # | Searches for an exact phrase.<br><br>**Example**: "software #as #a service"<br><br>**Finds**: documents containing the exact phrase "software as a service". |
| Find keyword variation | * (asterisk) | Place the asterisk sign at the end of a word to search for a variety of endings. The asterisk is a placeholder for 0 or more characters.<br><br>**Example**: deprecia*<br><br>**Finds**: documents containing terms beginning with the letters deprecia: depreciation, depreciate, depreciable, and so forth. |

| To: | Use: | Examples: |
|---|---|---|
| Limit keyword variation | # (number sign) | Use the number sign to disable Checkpoint's automatic inclusion of equivalencies and plurals for the search term. The number sign must immediately precede the search term to be effective.<br>**Example**: #damage<br>**Finds**: damage<br>**Does not find**: damages, damaged |
| Find keyword variation | ? (question mark) | Use the question mark to replace a single character in a search term. You can use this wildcard more than once in a single word.<br>**Example**: s????holder<br>**Finds**: stockholder, shareholder |
| Find keyword variation | - (hyphen) | Use the hyphen to find variations of compound words.<br>**Example**: e-mail<br>**Finds**: e-mail, email, e mail |

# Using Stop Words

Checkpoint employs “stop words,” which are words that are too common to add value to a search string because they appear in most documents. However, Checkpoint does search for stop words that appear at the beginning or end of an exact phrase, such as “after school”. Stop words within phrases act as placeholders. For example: “payable on demand” also matches “payable upon demand” and “payable without demand”.

**Note**: If you want Checkpoint to search on the full phrase including stop words, a pound sign (#) should be put in front of each stop word. For example, "software #as #a service".

The following is a list of Checkpoint stop words:

| | | | |
|---|---|---|---|
| A | ABOVE | ABOUT | AFTER |
| ALSO | ALTHOUGH | AN | AND |
| AS | AT | BE | BECAUSE |
| BEFORE | BETWEEN | BUT | BY |
| EITHER | FOR | FROM | FURTHER |
| HERE | HOWEVER | IF | IN |
| INTO | IS | NOW | OF |
| ON | OR | OTHER | OUT |
| OVER | SINCE | SUCH | THAN |
| THAT | THE | THEN | THERE |

| | | | |
|---|---|---|---|
| THEREFORE | THESE | THIS | THOSE |
| THROUGH | THUS | TO | UNDER |
| UNTIL | UPON | WHAT | WHEN |
| WHERE | WHETHER | WHICH | WHILE |
| WITH | WITHIN | WITHOUT | |

# Using Wildcards

Use wildcard symbols to broaden the scope of your search. Wildcard characters act as placeholders that can represent a single character, multiple characters, or an entire word.

When you attach a wildcard to your search terms, Checkpoint retrieves documents that contain either the keywords or variations of the keywords as determined by the type of wildcard you use.

**Example**: A search for the term "termina*" retrieves documents that contain the terms: terminate or termination or terminations or terminal, and so forth.

| Connector | Purpose | Example |
|---|---|---|
| ***** (asterisk) | The asterisk is a placeholder for 0 or more characters. Placing the asterisk (*) at the end of a word searches for a variety of endings. | **Example**: deprecia*<br>**Finds**: all words beginning with the letters deprecia, such as depreciate, depreciates, depreciation, and so forth. |
| **?** (question mark) | The question mark variable replaces a single character in a search term. The variable can appear anywhere within a search term except at the beginning. It can also appear more than once within the same term. | **Example:** hans? n<br>**Finds:** hanson, hansen<br>**Example:** s????holder<br>**Finds:** stockholder, shareholder |
| **#** (number sign) | The number sign at the beginning of a word disables equivalencies and plurals for the search term, but it does not disable possessives. The number sign must immediately precede the search term to be effective. | **Example**: #damage<br>**Finds**: damage<br>**Does not find**: damages<br>**Example**: #abe<br>**Finds**: abe, abe's<br>**Does not find**: abes, american bar endowment |
| **-** (hyphen) | The hyphen allows variations of compound words. | **Example**: e-mail<br>**Finds**: e-mail, e mail, email |

**Alert**! When displaying search results, Checkpoint may not necessarily highlight all keyword variations. Also, certain non-displayable portions of documents may contain keyword hits.

# Using the Checkpoint Thesaurus/Query Tool

When performing a search, you may wish to locate those documents that refer to your topic but do not contain the precise keywords you used when constructing your search. The **Thesaurus/Query Tool** lets you request that any documents containing your keywords or their synonyms should be retrieved by your search.

Each practice area has its own thesaurus. For example, if you conduct a keyword search of Federal sources, the **Thesaurus/Query Tool** displays only Federal terms that match your search criteria.

If you are searching sources from several practice areas, the **Thesaurus/Query Tool** generates an integrated list of related terms from the practice areas you selected.

The Thesaurus/Query Tool is available for both Intuitive Search and Terms & Connectors search. The features and functionality of the Thesaurus vary depending on whether you select Intuitive Search or Terms & Connectors as your search method.

**Note**: For users of earlier versions of Checkpoint, the current **Thesaurus/Query Tool** replaces and enhances the functionality formerly provided by the '$' wildcard character.

### To use the Thesaurus in your search:

1. On the menu bar, click the **Search** menu.
2. On the **Search** screen, in the Keywords field, type the keywords that best describe your research topic.
3. Select either Intuitive Search or Terms & Connectors.
4. Click the **Thesaurus/Query Tool** link below the **Keywords** field.

   The **Thesaurus/Query Tool** dialog box opens with the **Tools** link as the default.
5. To add search syntax and connectors to the **Current Query** pane, select the connector in the **Connectors** pane, and then click **Append**.
6. To view a list of synonyms for your **Current Query** keywords, click the **Thesaurus** link.

   The Thesaurus displays synonyms in the **Select Alternatives** pane.
7. To add alternative terms to the **Current Query** keywords, see the following table.

| | |
|---|---|
| To add a single term listed in the **Select Alternatives** pane to your search: | Click the term once. |
| To add several terms in the **Select Alternatives** pane to your search at the same time: | Select the appropriate keyword in the **Select Term** pane, press and hold the **Ctrl** key, and then click the terms in the **Select Alternatives** pane that you want to add to the selected keyword. Repeat this procedure for each keyword. |
| To add all terms in the **Select Alternatives** pane: | Click the **Include all alternatives in query** link. |

Every time you add a related term to your search, the **Current Query** pane automatically updates to show your query selections.

**Note**: You can activate the **Automatically apply all thesaurus terms** option from the Search/Display options screen if you want all available thesaurus terms to be applied automatically to your keyword searches.

**Note**: You can also manually edit your query in the **Current Query** pane. If you do so, make sure each term is separated by the bar (|) character.

8. If you selected **Intuitive Search**, you can use the **Restrictions** link to refine your search by requiring or excluding words from the search phrase.
   - Click the **Require** check box next to any term you want to require in the query.
   - Click the **Exclude** check box next to any term you want to exclude from the query.
9. Click **OK** to accept the changes you made to your search.

   The **Thesaurus/Query Tool** dialog box closes and Checkpoint returns to the **Search** screen, where your revised search query appears in the **Keywords** field.
10. Click **Search** to start your search and view the results.

### To use the Spell Checker:

The Thesaurus/Query Tool also includes a Spell Checker to check for spelling errors in your Checkpoint searches. For the following procedure, assume that you have already entered your keywords on the **Search** screen and clicked the **Thesaurus/Query Tool** link.

1. In the **Thesaurus/Query Tool** dialog box, click the **Spelling** link.
2. Make sure any search terms you want to spell check are entered in the **Current Query** pane.
3. Click **Check Again** to run the spell check.

   If Checkpoint recognizes a spelling error, it lists the word in question in the **Select Term** pane. Alternate spelling suggestions are displayed in the **Select Alternative** pane.
4. Click the correct word in the **Select Alternative** pane.
   The Thesaurus automatically updates the **Current Query** pane with the correct spelling.

# Using the WG&L Tax Dictionary

The WG&L Tax Dictionary is an authoritative reference guide to key taxation terminology. It includes definitions and explanations of more than 4,000 federal taxation terms, ranging from the highly technical definitions found in legislation to everyday tax slang.

The WG&L Tax Dictionary serves as an optional add-on available to all Checkpoint subscribers. If you are interested in adding WG&L Tax Dictionary to your subscription, please call **Tax & Accounting Sales** at 1-800-950-1216.

Entries in the WG&L Tax Dictionary are drawn from many authoritative resources.

- Internal Revenue Code Sections
- Treasury Regulations
- IRS Rulings
- Court Decisions
- Legislative History
- Law Review Articles
- Leading Tax Publications

**To locate a tax term definition using the WG&L Tax Dictionary:**

1. On the menu bar, click the **Search** menu.

   The **Search** screen appears.

2. On the left navigation bar, click **WG&L Tax Dictionary**.
3. Type the term you are searching for in the **Enter a Tax Term** field.
4. Click **Search**.

   Search results for the tax term definition appear on the **Search Results** screen. The results show the words that appear around the search term in each of the hits.

   **Note**: Document tools icons are available for printing, exporting, or saving. documents. You can also flag documents or add notes to documents.

5. Select the definition that meets your search criteria.

**Note**: If the term you are looking for is not found in the dictionary, you receive a message suggesting that you review your entry. The message also suggests possible alternatives.

# About the Checkpoint Catalyst™ Library

**Checkpoint Catalyst™** is a library in the Table of Contents designed for the tax professional. **Checkpoint Catalyst** uses embedded productivity tools and many features never seen before in a research product. As a result, it provides researchers with many benefits:

- Fast, easy to use, and intuitive in its approach to research workflow
- Goes beyond the law and regulations and provides expert analysis and practical guidance on complex tax issues
- Allows the researcher to read a high-level overview, find a quick answer, and easily drill down into detailed analysis
- Organizes all information needed on one screen
- Lets an experienced researcher focus on new or complex areas, while ensuring that an inexperienced researcher can consult all sources needed for a comprehensive research effort

**Checkpoint Catalyst** supplements core products by diving deeply into complex issues or transactions. It also works with opinion-oriented treatises to give a complete picture, editorial analysis, practical tools, and multistate charts. **Checkpoint Catalyst** was designed to help researchers significantly reduce the number of keyword searches and clicks required to find what they are looking for.

You can search the **Checkpoint Catalyst** sources from the **Table of Contents** screen or **Search** screen.

The **Checkpoint Catalyst** library is organized into categories containing topics essential for tax practice. Each topic includes a self-contained topical discussion with the following features:

- About the Author(s)
- Introduction
- Quick Look (topic number **000**, such as **102:000**)
- Background (topic number **050**, such as **102:050**)
- Subtopics (topic number **100**, such as **102:100**)

If a topic includes state coverage, the paragraph number begins with the topic number followed by **1000** (such as **102:1000**).

Individual state subtopics are identified with the two-letter state abbreviation following the topic number (such as **102CA:1000**).

You can open the full topic, which contains all related sub-topics, or open individual sub-topics in their own.

# Performing a Checkpoint Catalyst™ Search

You can perform a search of **Checkpoint Catalyst™** sources from the Catalyst Library on the **Table of Contents** screen or from the Editorial Materials section of the **Search** screen.

**To perform a Checkpoint Catalyst search from Table of Contents:**

1. On the menu bar, click the **Table of Contents** menu.

   The **Table of Contents** screen appears.

2. You can either select the check box next to the Catalyst Library to search the whole library, or expand the Catalyst Library and select specific categories.

3. Enter your search terms in the **Keywords** field.

4. Select either the Intuitive Search or Terms & Connectors method to perform the search.

5. Use the Thesaurus/Query Tool feature as necessary.

6. Click **Search**.

   The Search Results screen appears with the **Table of Contents** as the default view.

7. Expand the search results as needed to find the information you want to research.

8. If you want to view only the sources that have hits, click the **View hits only** icon in the document tools.

9. You can view Checkpoint Catalyst sources at the topic level or subtopic level. The topic level includes all subtopics in one view. To view the list of topics, click a source title.

   **Note**: If you open any subtopic, there is a **Show Full Topic** link at the top that lets you jump to the full topic level.

10. If you want to sort and rank your search results in order of relevance, click the **total number** of documents next to the Checkpoint Contents header, or the **number** of documents next to any of the categories.

    The documents are sorted and ranked by either **Relevance** or **Table of Contents** (depending on your **Sort by** setting) to your search criteria. **Gold stars** next to each document title indicate the relative score for your search query (with five gold stars being the most relevant).

11. After drilling down into the search results, select a document you would like to review. For this example assume that it is a full topic.

    The document opens on the **Document** screen. The full topic begins with information about the authors, and then provides an introduction, quick look, and background. You can select the **Show**

**More** links beneath each subtopic to fully expand its contents. Click **Show Less** as necessary to condense the subtopics.

12. The tabs in the Context Panel appear according to the document content. Not all tabs appear with all document. Click the tabs as needed to continue your review of contents, featured developments, search results, recommended documents, learning, links, and tools.
13. After exploring and expanding the subtopics, if you would like to return the topic to its original condensed form, click the Refresh icon in the document tools.

# Saving or Scheduling a Search

You may want to run certain searches again in the future. Checkpoint lets you save searches in folders and run them again at any time. You can store up to a maximum of 1000 searches.

**Note**: Checkpoint allows you to save a maximum of a 1000 documents and searches combined.

For complex searches that you have constructed, re-executing a saved search can save you time because your search criteria are already defined. The **Save/Schedule Search** feature saves your search parameters (search terms and target sources) so you can re-execute the search whenever you like. You can also save individual documents from the results of your search.

You can access the **Save/Schedule Search** link from the **Search Results** screen.

At the **Save or Schedule Search** dialog box, you can store a search for future use, schedule a search to run automatically, and arrange to be notified by e-mail when the results of your scheduled search are generated. If your saved search yields at least one result, you will also be notified when you log in to Checkpoint.

**To save/schedule a search:**

1. At the top of any **Search Results** screen, click **Save/Schedule Search**.

   The **Save or Schedule Search** screen appears.

2. Either accept the current folder that is listed or click **Change Folder** to select another folder.

   **Note**: If you click **Change Folder**, the **Change Folder** window opens. Here you can either select another folder from the list or click a link to create a new folder.

3. Type a new search name, or **Select Prior Search to Replace**.

4. Optionally, you can enter a note in the **Note** field.

5. Select the frequency from **Schedule** options.

   **Don't run automatically** is the default option. You also have options to run weekly or monthly.

   **Note**: SECPlus scheduled searches have the additional scheduling option of **Run twice a day** from the **Schedule** menu.

6. In the **Notification** section, you can select to have an e-mail sent to you when new results are found for your scheduled search.

   For this feature to operate, your e-mail address must be specified on the **Options** page. You can also select to have Checkpoint launch the **Home** page upon login when new results are available. New results for scheduled searches are always available on the **Home** menu.

7. Click **Save**.

   **Note**: You will lose any changes if you leave this screen without clicking **Save**.

Your search is stored in the folder you designated. Click **Folders** on the top toolbar to retrieve a saved search.

# Saving a Document

Saving documents in **Document Folders** is a great time-saver, because the next time you want to view that document, you do not need to perform a search or "drill down" through the **Table of Contents** to retrieve it. You can store up to 1000 documents across a maximum of 250 folders.

**Note**: 1000 represents the maximum number of documents and searches combined that Checkpoint permits you to save. Consider exporting documents if you are approaching this limit.

You can save a document from the **Search Results** screen or from an open document. Documents can be saved either to the default folder on the **Folder** screen, or you can create a new folder and name it as necessary.

### To save a document from Search Results:

1. In a **Search Results** view that displays document tools, select the check box next to each document you want to save.
2. Click the down arrow next to the **Save** icon in the document tools to choose either the **Save** or **Save As** option.
    - If you click **Save**, the document is saved to the current folder on the **Folders** screen and you are finished.
    - If you click **Save As**, the **Save Document** window opens, where you can select another folder or create a new folder. Continue with Step 3.
3. On the **Save Document** window, click **Change Folder**.
4. When the **Change Folder** window opens, you can either select another folder from the list or click a link to create a new folder.
    - If you want to select another folder, click the folder name and click **OK**.
    - If you want to create a new folder, click **Create New Folder**. When the **Create Folder** window opens, enter the new folder name, select a location, and click **Create**. The new folder is added to the **Change Folder** window. Click the new folder name and click **OK**.
5. Optionally, on the **Save Document** window, you can enter a **Note** for the document. If you enter a note, the note is added to the top of the document.
6. Click **Save** to add the document to the selected folder on the **Folders** screen.

### To save an open document:

**Note**: If you click the down arrow next to the **Save** icon, you can choose either **Save** or **Save As**. A checkmark next to one of the options in the drop-down list indicates which option was last used. If you click the **Save** icon directly, Checkpoint saves using the most recently used option. Assume for this procedure, **Save As** was the last used and is the default option.

1. On the **Document** screen, click the **Save** icon from the document tools.

   The **Save As** option is the default, so the **Save Document** window opens.

2. On the **Save Document** window, click **Change Folder**.

3. When the **Change Folder** window opens, you can either select another folder from the list or click a link to create a new folder.

   - If you want to select another folder, click the folder name and click **OK**.
   - If you want to create a new folder, click **Create New Folder**. When the **Create Folder** window opens, enter the new folder name, select a location, and click **Create**. The new folder is added to the **Change Folder** window. Click the new folder name and click **OK**.

4. Optionally, on the **Save Document** window, you can enter a **Note** for the document. If you enter a note, the note is added to the top of the document.

5. Click **Save** to add the document to the selected folder on the **Folders** screen.

# Retrieving a Saved Document

1. On the top toolbar, click **Folders**.

   The **Folders** screen appears.

2. On the left navigation bar, open the folder containing the document you want to retrieve.
3. Click a document title to view the text of the document.

**Note**: You can also print or export documents stored in your document folders.

# Retrieving a Saved Search

You can access the searches you save and run them again at any time. You can also delete a saved search, or move it to another folder.

**To retrieve a saved search:**

1. On the top toolbar, click **Folders**.

   The **Folders** screen appears.

2. On the left navigation bar, select the folder containing the search you want to retrieve.

3. Locate the search and review its attributes. If they seem appropriate to your research questions, click the magnifying glass icon in the **Type** column.

   The search re-executes, and search results appear on the **Results** screen.

## Removed, Replaced, or Re-categorized Sources

Several times a year, sources within Checkpoint are removed, replaced, or re-categorized. When a saved search uses a removed, replaced, or re-categorized source or source set, Checkpoint displays a message under the **Name/Keywords** column on the **Folders** screen indicating that you should re-create the search or delete the obsolete sources from the search set.

Click the **more...** link to view a full list of sources for that search. Invalid sources appear as red italics in the list. To remove these sources from the search, click the **here** link at the top of the **Source List** screen.

If you attempt to run a search containing obsolete sources, a message box appears advising you of this. If the search contains valid sources, you are allowed to continue; otherwise you are required to re-create the search.

# Moving a Saved Search or Document

You can move searches and documents you have saved from one folder to another within Checkpoint.

**To move a saved search or document:**

1. On the top toolbar, click **Folders**.
2. On the left navigation bar, select the folder that contains the item you want to move.
3. Select the check box for each item to be moved.
4. Click the **Move** icon from the document tools.
5. On the **Move Items** pop-up window, you can select an existing folder or create a new folder for the item to be moved.
    - For an existing folder, select the destination folder and click **Move**.
    - To create a new folder, select the level where you want the new folder to be, and then click **Create Folder**. Enter the name of the new folder and then click **Create**. Now click **Move** to move the selected item to the new folder.

# Deleting Saved Searches and Documents

You can delete searches and documents you have saved from a folder when they are no longer required.

**To delete a saved search or document:**

1. On the top toolbar, click **Folders**.
2. On the left navigation bar, select the folder containing the item you want to delete.
3. Select the check box for the item to be deleted.
4. Click the **Delete** icon from the document tools.
5. At the prompt, click **OK** to confirm your action.

# Using Saved Documents

Once you have saved a document in any of your document folders, you can retrieve it at any time, or you can delete it when you no longer need it.

**Note**: You can print or export documents stored in your document folders. You can also flag a document and add notes to a document.

# E-mail Notification of Search

When you schedule a search to run, you have the option of receiving e-mail notification when new results of a search you scheduled are reported. You can be informed by e-mail, within 24 hours of the scheduled search being run, of the time and date of the executed search, the name of the search, and the number of new documents available for viewing in Checkpoint. To use the e-mail option, you must provide a publicly accessible e-mail address on the **Options** screen.

**To enter your e-mail address:**

1. On the top toolbar, click Options.
2. On the left navigation bar, select **Personal/Password.**
3. Enter your e-mail address in the **Personal** section.
4. Click **Save and close**.

## How Notification Works

Searches are run beginning at 12:30 a.m. CST on the day they are scheduled.

If your search was executed and new documents were retrieved, and if you have elected to be notified by e-mail, Checkpoint creates an e-mail message and sends it to the e-mail address you specified on the **Options** screen. Multiple search results for the same day are bundled into one e-mail notification message. If the search returns no new documents, you will not receive an e-mail message.

**For example, to schedule a search to run at 12:30 a.m. every Tuesday:**

1. Before 12:00 midnight CST on Monday, schedule the search to run.
2. On Tuesday at 12:30 a.m. CST, your scheduled search is run. If new documents have been retrieved, the system sends you an e-mail message. This message contains the name of the scheduled search, the time and date of the search, and the number of new documents available for viewing in Checkpoint.
3. The Scheduled Searches pane on the **Home** screen tells you when the search last ran, and if you have any new results to view.

> **Note**: Because this is a scheduled search, it returns new documents only for the time period for which it was scheduled. If you are running a weekly search, you will receive notification of NEW items for the seven days preceding the search.

If you run a manual search, you may receive different results. A manual search is not associated with a time frame and will include all documents that match the criteria.

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# Using Income Tax Developments Wizard - Saving or Scheduling a Search

You may want to automatically run certain **Income Tax Developments Wizard** (ITDW) searches quarterly.

For complex searches that you have constructed, re-executing a saved search can save you time because your search criteria are already defined. The **Save Search** feature saves your search parameters - search terms and target sources - so you can re-execute the search whenever you like. You can also save individual documents from the results of your search.

At the **Save or Schedule Search** screen, you can store a search for future use, schedule a search to run automatically, and arrange to be notified by e-mail when the results of your scheduled search are generated. If your saved search yields at least one result, you will also be notified when you login to Checkpoint.

To run the ITDW, see Tax Developments Wizard.

### To save an ITDW search:

1. After running the wizard, click the **Save or Schedule to run Quarterly** button.

   The **Save or Schedule Tax Developments Wizard** screen appears.

2. Either accept the current folder that is listed or click **Change Folder** to select another folder.

   **Note**: If you click **Change Folder**, the **Change Folder** window opens. Here you can either select another folder from the list or click a link to create a new folder.

3. In the **Name** field, type a name that describes the purpose of the search, or overwrite an existing saved search by choosing a name from the list of previously saved searches.

   **Alert!** Selecting a previously saved search from this list overwrites that search. You will lose all information recorded in the original search.

4. Optionally, you can enter a note in the **Notes** field, up to 200 characters.

5. Click **Save** to save the search. You will lose any changes if you leave this screen without clicking **Save**.

### To schedule an ITDW search:

You can schedule an ITDW search to run automatically on a quarterly basis.

1. On the **Save or Schedule Tax Developments Wizard** screen, select the **Schedule** frequency options if you want to have the search run automatically on a regular basis.

2. In the **Frequency** section, select the quarterly date you want to run the search. If you do not want to run the scheduled search automatically, select the **Don't run automatically** option.

3. In the **Notification** section, you can select to have an e-mail sent to you when new results are found for your scheduled search. For this feature to operate, your e-mail address must be specified on the **Options** screen. You can also select to have Checkpoint launch the **Home** screen upon login when

new results are available. New results for scheduled searches are always available on the **Home** screen.

4. Click **Save** to save the scheduled search. You will lose any changes if you leave this screen without clicking **Save**.

Your search is stored in the **Searches** table. Click **Folders** on the top toolbar to retrieve a saved search.

# About International Tax Searches

The **International Search** screen provides templates to search in many ways.

**To access international search templates:**

1. Click the **Search** menu.
2. Select the **International** practice area.

   Links to all templates appear on the left navigation bar.

### Keyword Search

1. On the left navigation bar, select **Keyword Search** (default).
2. Enter terms to define your search topic in the **Enter Keywords** field.
3. Select either the Intuitive Search or Terms & Connectors method to perform the search.
4. Select the sources you want to search.
5. Click the + symbol to open folders listing multiple resources.
6. Select check boxes for specific resources or at the top level for all material in the following categories:
   - Editorial Materials
   - Primary Source Materials
   - Legislation (Editorial Analysis and Source Material)
   - News/Current Awareness
   - Archive Materials
7. Click **Search** to view results.

### Search U.S. Tax Treaties

1. On the left navigation bar, select **Search U.S. Tax Treaties**.
2. Select one or more countries.
3. Select one or more treaty types.
4. Click **Next**.
5. Enter terms to define your search in the **Keywords** field.
6. Select either the Intuitive Search or Terms & Connectors method to perform the search.
7. Select document types and, optionally, supporting documents and editorial explanations.
8. Click **Search** to view results.

### Search Other Int'l Products

1. On the left navigation bar, select **Search Other Int'l Products**.
2. Select from the following list of products:
    - RIA Tax & Commercial Law
    - IBFD Regional Databases
    - IBFD Tax Treaties
    - IBFD Tax Glossary (Search by Keyword or Appendices)
    - IBFD Transfer Pricing
    - EU Law
3. Select the region, country, case name or citation, keywords, terms, treaty types and document types appropriate for the search criteria.
4. Click **Next** when needed to continue entering criteria.
5. Click **Search** to view results.

### FATCA Essentials

1. On the left navigation bar, select **FATCA Essentials**
2. Enter terms in the **Keywords** field to define your search.
3. Select either the Intuitive Search or Terms & Connectors method to perform the search.
4. Select the document types you want to search from the **Choose Document type** section.
5. Select check boxes for specific resources in the following categories:
    - Editorial Materials
    - Primary Source Materials
    - News/Current Awareness

    Or, click the **Select All** button to select all available resources. To uncheck all selections click the **Deselect All** button.
6. Click **Search** to view results.

### Find by Citation

1. On the left navigation bar, select **Find by Citation**.
2. Select from the following list of citation sources:
    - Code & Regs
    - Cases
    - Rulings

- IRS Pubs & Other Tax Docs
- More ... (multiple sources)

3. Enter your search criteria.

   Use the on-screen examples for formatting help.

4. Click **Search** to view results.

### Date Range Search

1. On the left navigation bar, select **Date Range Search**.
2. Select **Cases** or **Rulings**, as needed.
3. Select the type of case or ruling.
4. Select the **Date Range**.

   Use the calendar or enter directly in the **From** and **To** fields using the MM/DD/YYYY format.

5. Enter terms to define your search topic in the **Keywords** field.
6. Select either the Intuitive Search or Terms & Connectors method to perform the search.
7. Click **Search** to view results.

# Searching EU Law

The **EU Law** search screen provides two templates to search for EU Law content.

**To access EU Law search templates:**

1. Click **Search** on the menu bar.
2. Select the **International** practice area.
3. On the left navigation bar, select **Search Other Int'l Products**.
4. On the left navigation bar, click **EU Law** .

   Two templates appear on the screen.

### Retrieve by Case Name or by Citation

1. Enter your search criteria in either the **EU Court of Justice Cases** or **EU Directives and Other Documents** search fields.

   Use the on-screen examples for formatting help.
2. Click **Search** to view results.

### Search Keywords

1. Select the content you want to search by selecting the check box next to one or more content areas:
   - EU Corporate Law
   - EU Tax Law
   - EU Court of Justice Cases
   - EU Law Commentary
2. Enter terms to describe your search in the **Keywords** field.
3. Select either the Intuitive Search or Terms & Connectors method to perform the search.
4. Click **Search** to view results.

# Searching IBFD Regional Databases

Use the **IBFD Regional Databases** search template to search for IBFD content within specific regional databases.

**To use the IBFD Regional Database search template:**

1. Click **Search** on the menu bar.
2. Select the **International** practice area.
3. On the left navigation bar, select **Search Other Int'l Products**.
4. On the left navigation bar, click **IBFD Regional Databases**.
5. Select the **Regional Database(s)** you want to search.
6. Click **Next**.
7. Select one or more jurisdictions to include in your search.
8. Select one or more **Document Types**.
9. Enter terms to describe your search in the **Keywords** field.
10. Select either the Intuitive Search or Terms & Connectors method to perform the search.
11. Click **Search** to view results.

# Searching IBFD Tax Glossary

Use the **IBFD Tax Glossary** search templates to find definitions and explanations of international tax terminology.

**To access the IBFD Tax Glossary:**

1. Click **Search** on the menu bar.
2. Select the **International** practice area.
3. On the left navigation bar, select **Search Other Int'l Products**.
4. On the left navigation bar, select **IBFD Tax Glossary**.

   Two templates are available.

### Search by Keyword

The **Search by Keyword** template opens by default when you select **IBFD Tax Glossary**.

1. Enter a term in the **Enter a Glossary Term** field, or select the Thesaurus/Query Tool for more advanced search features.
2. Click **Search** to view results.
3. From the search results, select the link to view the definition or explanation for the glossary term.

### Search Appendices

1. On the left navigation bar, click **Search Appendices**.
2. Select the country or countries you want to search.
3. Select one or more **Document Types**.
4. Click **Search** to view results.
5. From the search results, select the link to view the definition or explanation for the glossary term.

# Searching IBFD Tax Treaties

Subscribers of international content can retrieve IBFD Tax Treaties sorted by jurisdiction / organization and by other important treaty identifiers, including treaty type and document type.

**To search for an IBFD Tax Treaty:**

1. Click **Search** on the menu bar.
2. Select the **International** practice area.
3. On the left navigation bar, select **Search Other Int'l Products**.
4. On the left navigation bar, select **IBFD Tax Treaties**.
5. Select at least one jurisdiction/organization.
6. Click **Next**.
7. Select at least one jurisdiction/organization.
8. Optionally, select treaty type and document type.
9. Optionally, enter terms to describe your search in the **Keywords** field.
10. Select either the Intuitive Search or Terms & Connectors method to perform the search.
11. Click **Search** to view results.

# Searching IBFD Transfer Pricing

Use the **IBFD Transfer Pricing** search template to find the latest information on international transfer pricing issues and developments.

**To search Transfer Pricing:**

1. Click **Search** on the menu bar.
2. Select the **International** practice area.
3. On the left navigation bar, select **Search Other Int'l Products**.
4. On the left navigation bar, select **IBFD Transfer Pricing**.

   The **Search IBFD Transfer Pricing by Country or Organization** screen appears.
5. Select one or more countries or organizations to search.
6. Select one or more **Document Types**.
7. Optionally, enter terms to define your search in the **Keywords** field.
8. Select either the Intuitive Search or Terms & Connectors method to perform the search.
9. Click **Search** to view results.
10. From the search results, select the link to view a document.

# Searching U.S. Tax Treaties in the International Practice Area

Checkpoint's International Search template helps researchers find U.S. tax treaty information by country, treaty type, document type, and other optional treaty identifiers.

**To search U.S. Tax Treaties:**

1. Click **Search** on the menu bar.
2. Select the **International** practice area.
3. On the left navigation bar, select **Search U.S. Tax Treaties**.
4. Select one or more countries.
5. Select one or more treaty types.
6. Click **Next**.
7. Optionally, enter terms to define your search in the **Keywords** field.
8. Select either the Intuitive Search or Terms & Connectors method to perform the search.
9. Select document types and, optionally, supporting documents and editorial explanations.
10. Click **Search** to view results.

# Searching RIA Worldwide Tax & Commercial Law

Use the **Search RIA Worldwide Tax & Commercial Law** template to search by keywords within specific worldwide tax law regions.

**To search worldwide Tax & Commercial Law:**

1. Click **Search** on the menu bar.
2. Select the **International** practice area.
3. On the left navigation bar, select **Search Other Int'l Products**.
4. On the left navigation bar, click **RIA Tax & Commercial Law**.
5. Select one or more **regions**..
6. Click **Next** .
7. Select one or more countries.
8. Select one or more **Document Type(s**).
9. Enter terms to define your search in the **Keywords** field.
10. Select either the Intuitive Search or Terms & Connectors method to perform the search.
11. Use the Thesaurus/Query Tool for more advanced search features if needed.
12. Click **Search** to view results.

# About State and Local Searches

Checkpoint provides a range of tools to perform searches in the **State & Local** practice area. For each tool, Checkpoint provides a search template to help guide you through the process of searching State & Local taxation materials. Each template presents you with a series of screens that, based on the choices you make, lead you to the outcome most appropriate to your search requirements.

The State & Local search templates automate and simplify a search by filtering out information that does not apply to the state or states you want to search.

Note: On the first page of the state and local wizard, the states now have a book icon that appears when you hover over the state name. When you click this icon, the State Reporter for that state opens in the Table of Contents.

# Finding by Citation

**To find a case, statute, ruling, or regulation by citation number/name:**

1. Click **Search** on the menu bar.
2. Select the **State & Local** practice area.
3. On the left navigation bar, select **State & Local Tax Reporters**.
4. Select the check box for the state you want to search.
5. Click **Next**.
6. On the left navigation bar, click one of the options under the **Find by Citation** heading.

| Option | Action |
|---|---|
| **Cases** | Find a case by name or citation |
| **Statutes** | Find a statute by number |
| **Rulings** | Find a ruling by number |
| **Regulations** | Find a regulation by number |

7. Type the citation in the appropriate field.

   See formatting example on the search screen.

8. Click **Search**.

   The **Search Results** screen appears with a default view of either **All Documents**, **Source List**, or **Table of Contents**. You can toggle between these views by clicking the appropriate link. To further define search results, the **Source List** and **Table of Contents** views let you choose **View Hits Only** or **View All Results** (in the document tools).The **Table of Contents** format also has **Display Level** options (**1, 2, 3**) that let you expand or collapse the folders shown. You can manage default settings in the **Search/Display** section of the screen.

9. If necessary, drill down to the document level in the **Search Results** screen, and click a document name to view its contents.

# Using the State Index Tool

The State Index tool provides access to tax-related laws for each state, indexed by the state's own categories.

**To use the Go To state index feature:**

1. Click **Search** on the menu bar.
2. Select the **State & Local** practice area.
3. On the left navigation bar, under **Go To**, click **State Indexes**.
4. Click the state you want to search.

   The index result appears in the Checkpoint Contents section of the **Table of Contents**.
5. Select the category you want to review.
6. Drill down to the tax code section number, and click the number to view the document.
7. Use document tools at the top of the screen to print, export, e-mail, or save the document or selected text.

# Retrieving Sales & Use Rates

The **Sales & Use Rate Lookup** tool lets you retrieve state and local sales and use tax rates for any jurisdiction in the United States. You can view summaries of up-to-date tax rates presented in easy-to-read tables.

You can access the **Sales & Use Rate Lookup** template in either of two ways:

1. Click **Tools** on the menu bar.
2. On the left navigation bar, click **Sales & Use Rate Lookup**.

OR

1. Click **Search** on the menu bar.
2. Select the **State & Local** practice area.
3. On the left navigation bar, under the **Go To** heading, click **Sales & Use Rate Lookup**.

   The **Sales & Use Rate Lookup** template appears.

> **Note**: Access to this template is restricted to paid Checkpoint subscribers.

You can perform three types of searches using the **Sales & Use Rate Lookup** tool:

- **Search by State, County, City**
- **Search by Zip Code**
- **Compare Rates / View Prior Rates**

# Searching Across Multiple States

If your State & Local practice area subscription includes access to more than one state, Checkpoint provides a state selection template that is built into the State & Local Taxes Search screen.

**To search across multiple states:**

1. Click **Search** on the menu bar.
2. Select the **State & Local** practice area.

   The State & Local Tax Reporters option on the left navigation bar is the default setting. The **Search RIA State & Local Tax Reporters** template appears at right, listing all the states in your subscription.
3. Select the check box for one or more states.
4. Click **Next**.

   The search template displays the Tax and Document types common to the states you selected, as well as an optional Keyword field.
5. Choose one or more tax and document types.
6. Optionally, enter terms to describe your search in the **Keywords** field.
7. Click **Search**.

   The **Search Results** screen appears with a default view of either **All Documents**, **Source List**, or **Table of Contents**. You can toggle between these views by clicking the appropriate link. To further define search results, the **Source List** and **Table of Contents** views let you choose **View Hits Only** or **View All Results** (in the document tools).The **Table of Contents** format also has **Display Level** options (**1, 2, 3**) that let you expand or collapse the folders shown. You can manage default settings in the **Search/Display** section of the screen.
8. Click a state to view a list of the retrieved documents on the **Document List** screen.
9. Click a document name to view the document contents.

**Note**: You cannot conduct a citation search when you select more than one state. Citation searches are restricted to a single state.

# Searching Multistate Sections

The State & Local practice area contains two sectional or specialty search templates that allow you to conduct research on specific tax topics across states. These are the **Multistate Corporate Income** and **Multistate Sales & Use** sectional templates. You can subscribe to either or both products. The procedure for performing a sectional search is very similar to that for searching multiple states.

**To perform a sectional search:**

1. Click **Search** on the menu bar.
2. Select the **State & Local** practice area.
3. On the left navigation bar, select **Corporate Income Tax Reporter** or **Sales & Use Tax Reporter**.

   The **Search RIA State & Local Tax Reporter** screen (for **Corporate Income** or **Sales & Use**, as you selected) appears. As part of your subscription, all states are available for selection. You cannot subscribe to individual jurisdictions within a sectional.
4. Select check boxes in front of the states you want to search.
5. Click **Next**.

   The search template displays the Tax and Document types common to the states you selected, as well as an optional **Keyword** field.
6. Select one or more tax types and document types.
7. Optionally, enter terms to describe your search in the **Keywords** field.
8. Click **Search**.

   The **Search Results** screen appears with a default view of either **All Documents**, **Source List**, or **Table of Contents**. You can toggle between these views by clicking the appropriate link. To further define search results, the **Source List** and **Table of Contents** views let you choose **View Hits Only** or **View All Results** (in the document tools).The **Table of Contents** format also has **Display Level** options (**1, 2, 3**) that let you expand or collapse the folders shown. You can manage default settings in the **Search/Display** section of the screen.

# Searching a Single State

If you subscribe to a single state (for example, CA) in the **State & Local** practice area, the search template for the state to which you subscribe provides you with a number of search options. This template is also available for who select only one state on the **Search RIA State and Local Tax Reporters** screen.

You can search a state in the following ways:

**Note**: The State Search template for each search is specific to your subscribed state, though the basic design and navigational features for all the state templates are the same.

# Searching State Cases by Court and Date

**To search state cases by court and date:**

1. Click **Search** on the menu bar.
2. Select the **State & Local** practice area.
3. On the left navigation bar, select **State & Local Tax Reporters**.
4. Select the check box for the state you want to search.
5. Click **Next**.

   The state name and search options appear in the left navigation bar.
6. Click the **Cases by Court/Date** link to display the **Search by Cases** template.
7. Click the check boxes for the courts you want to include in your search.
8. In the **Select Date Range** field, enter a MM/DD/YYYY date range to constrain your search.
9. Optionally, enter terms to define your search in the **Keywords** field, or select the for more advanced search features.
10. Click **Search** to view results.

# Following State Proposed Legislation

You can identify and follow proposed legislation at any or all stages of the legislative process. Filtering options offer the ability to track the state, date range and statues (Introduced, Passed, Enrolled, Signed and Vetoed) of the proposed legislation that is pertinent to your practice. The tool will allow you to follow the proposed legislation through the legislative process.

**To identify the Proposed Legislation**:

1. Go to the **News** screen.
2. Select **RIA Daily Updates** from the **News Service** drop down on the left navigation bar.
3. On the left navigation bar, select **State Proposed Legislation**.
4. Enter your query in the **Current Year State Proposed Legislation** template by selecting the required State, Date Range and one or more legislation Statuses.
5. Click the **Submit** button. The **State Proposed Legislation Results** page is displayed.

**Note**: If no legislation status is selected on the **Current Year State Proposed Legislation** page, by default the **State Proposed Legislation Results** page displays all legislations (Introduced, Passed, Enrolled, Signed, Vetoed) for the state and date range selected.

## Follow It

You can use the **Follow it** feature within the legislation to be notified when any changes are made to it.

Follow It can be activated from within the legislation summaries that appear based on your State Proposed Legislation query or from within the legislation.

**To activate Follow it from the State Proposed Legislation Results**:

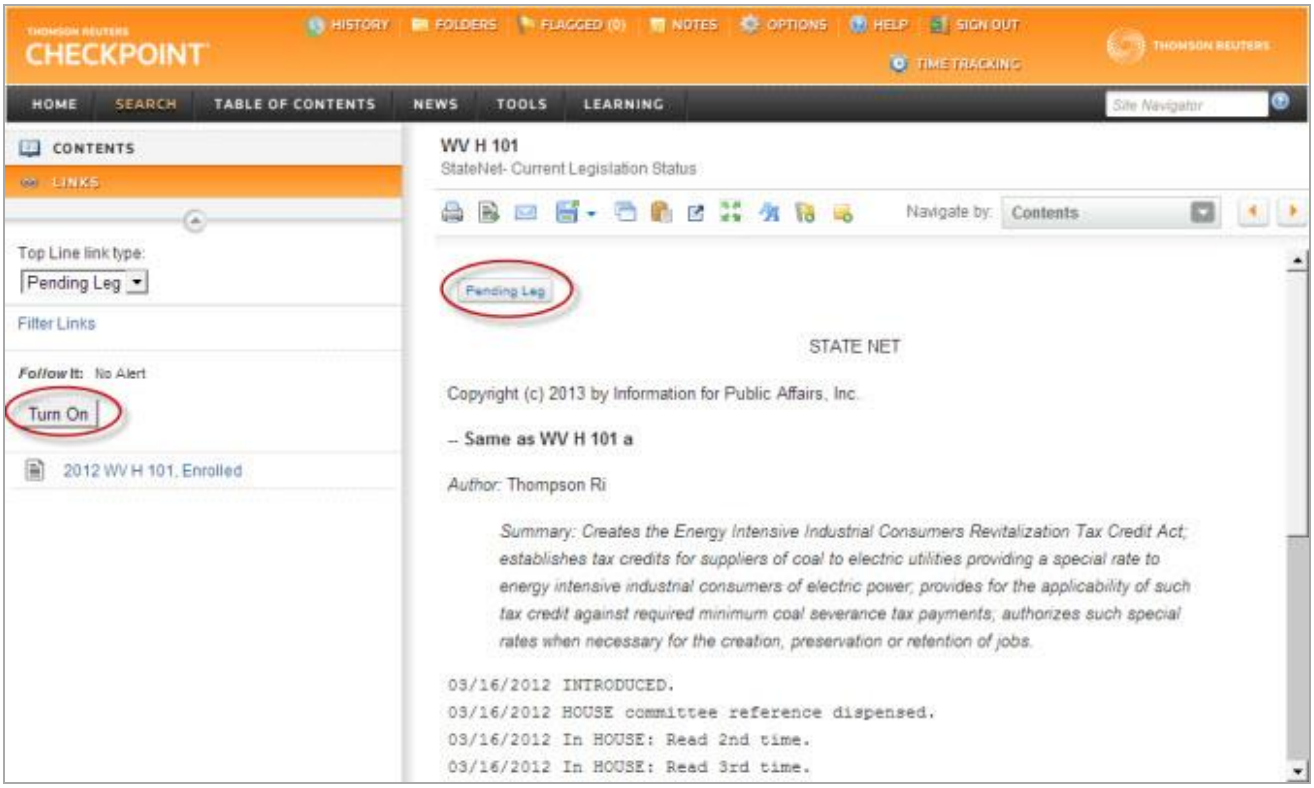
1. Click the **Follow It** button at the end of the legislation summary, below the **Latest Status**.

   The selection will toggle the button to display **Unfollow It**. In addition, the expiration date is displayed next to the button.

**OR**

**To activate Follow it from within the legislation**:

1. At the top of the legislation, in the top line links, click the **Leg Status/ Pending Leg** link.
2. Click the **Turn On** button under **Follow It**, in the left navigation bar.
   The selection will toggle the button to display **Turn Off**. In addition, the expiration date is displayed above the button.


CHECKPOINT
HISTORY
FOLDERS
FLAGGED (0)
NOTES
OPTIONS
HELP
SIGN OUT
TIME TRACKING
HOME
SEARCH
TABLE OF CONTENTS
NEWS
TOOLS
LEARNING
Site Navigator
CONTENTS
LINKS
Top Line link type:
Pending Leg
Filter Links
Follow It: No Alert
Turn On
2012 WV H 101, Enrolled
WV H 101
StateNet- Current Legislation Status
Navigate by:
Contents
Pending Leg
STATE NET
Copyright (c) 2013 by Information for Public Affairs, Inc.
-- Same as WV H 101 a
Author: Thompson Ri
Summary: Creates the Energy Intensive Industrial Consumers Revitalization Tax Credit Act; establishes tax credits for suppliers of coal to electric utilities providing a special rate to energy intensive industrial consumers of electric power; provides for the applicability of such tax credit against required minimum coal severance tax payments; authorizes such special rates when necessary for the creation, preservation or retention of jobs.
03/16/2012 INTRODUCED.
03/16/2012 HOUSE committee reference dispensed.
03/16/2012 In HOUSE: Read 2nd time.
03/16/2012 In HOUSE: Read 3rd time.

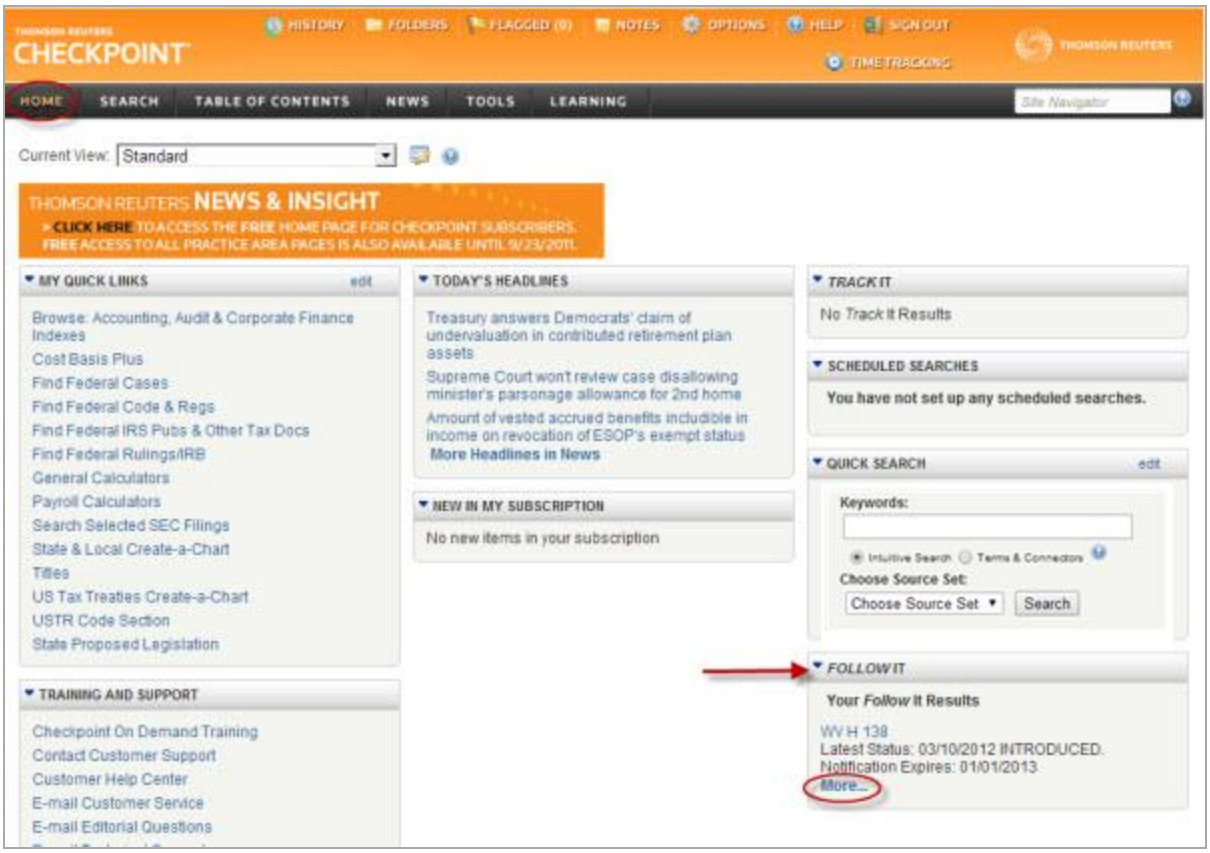
You will be notified by e-mail that **Follow It** has been activated for a document. When a new change is made to the bill, you will receive an e-mail notifying you of the changes. The changes will be tracked till the end of each calendar year.

To stop following the legislation click the **Unfollow It** button within the legislation summary or the **Turn Off** button from within the legislation.

### To view the followed legislation from the Home screen:

1. Click the link to the legislation you are following from the **Follow it** pane. The current legislation status is displayed.
2. Select a link in the left navigation bar to open the referencing document.

   A new window displays the document that references the legislation being tracked.


CHECKPOINT
HISTORY
FOLDERS
FLAGGED (0)
NOTES
OPTIONS
HELP
SIGN OUT
TIME TRACKING
HOME
SEARCH
TABLE OF CONTENTS
NEWS
TOOLS
LEARNING
Site Navigator
Current View: Standard
THOMSON REUTERS NEWS & INSIGHT
> CLICK HERE TO ACCESS THE FREE HOME PAGE FOR CHECKPOINT SUBSCRIBERS.
FREE ACCESS TO ALL PRACTICE AREA PAGES IS ALSO AVAILABLE UNTIL 9/23/2011.
MY QUICK LINKS
edit
Browse: Accounting, Audit & Corporate Finance Indexes
Cost Basis Plus
Find Federal Cases
Find Federal Code & Regs
Find Federal IRS Pubs & Other Tax Docs
Find Federal Rulings/IRB
General Calculators
Payroll Calculators
Search Selected SEC Filings
State & Local Create-a-Chart
Titles
US Tax Treaties Create-a-Chart
USTR Code Section
State Proposed Legislation
TRAINING AND SUPPORT
Checkpoint On Demand Training
Contact Customer Support
Customer Help Center
E-mail Customer Service
E-mail Editorial Questions
TODAY'S HEADLINES
Treasury answers Democrats' claim of undervaluation in contributed retirement plan assets
Supreme Court won't review case disallowing minister's parsonage allowance for 2nd home
Amount of vested accrued benefits includible in income on revocation of ESOP's exempt status
More Headlines in News
NEW IN MY SUBSCRIPTION
No new items in your subscription
TRACK IT
No Track It Results
SCHEDULED SEARCHES
You have not set up any scheduled searches.
QUICK SEARCH
edit
Keywords:
Intuitive Search
Terms & Connectors
Choose Source Set:
Choose Source Set
Search
FOLLOW IT
Your Follow It Results
WV H 138
Latest Status: 03/10/2012 INTRODUCED.
Notification Expires: 01/01/2013
More...

# Searching State Rulings by Date

**To search state rulings by date:**

1. Click **Search** on the menu bar.
2. Select the **State & Local** practice area.
3. On the left navigation bar, select **State & Local Tax Reporters**.
4. Select the check box for the state you want to search.
5. Click **Next**.

   The state name and search options appear in the left navigation bar.
6. Click **Rulings by Date** to display the **Search Rulings by Date** template.
7. Click the check boxes for the ruling types you want to include in your search.
8. In the **Select Date Range** field, enter a MM/DD/YYYY date range to constrain your search.
9. Optionally, enter terms to define your search in the **Keywords** field, or select the for more advanced search features.
10. Click **Search** to view results.

# Searching the State Tax Citator

**State Tax Citator** provides a history of the case or ruling, plus cited references (an aggregate of all cases that reference/cite the document). Use this function to search for state tax cases and citations within a specific jurisdiction.

**To perform a State Tax Citator search:**

1. Click **Search** on the menu bar.
2. Select the **State & Local** practice area.
3. On the left navigation bar, click **Search Other State Products**.
4. On the left navigation bar, click **State Tax Citator**.
5. On the **Select a Jurisdiction** view, select the state jurisdiction you want to search.
6. Click **Next**.
7. On the **Citator** search template, enter the citation number or case name you want to find.
8. Click **Search**.

   A specific citation will return a link to a specific document. A court name search may return several documents.
9. Click the document name to view contents.

**Note**: Depending on the jurisdiction selected, there may be optional fields for narrowing your search results.

# Searching State Tax Type/Document Type

To search by state tax/document type:

1. Click **Search** on the menu bar.
2. Select the **State & Local** practice area.
3. On the left navigation bar, select **State & Local Tax Reporters**.
4. Select the check box for the state you want to search.
5. Click **Next**.

   The state name and search options appear in the left navigation bar. The **Search by tax type, document type and keyword** template for the selected state appears on the right.
6. Select the check boxes for the **Tax Types** and **Document Types** you want to include in your search.

   **Note**: Hover over any of the **Tax Type** and **Document Type** check boxes when searching within a single state to view specific information for the state selected. This feature is not available for searches within multiple states.
7. Optionally, enter terms to define your search in the **Keywords** field, or select the for more advanced search features.
8. Click **Search** to view results.

**Note**: Each search result is labeled with the document type (Explanations, Annotations, Form Instructions, Statutes, Regulations, Cases, Rulings and Official Materials) before the document name.

# Searching Tax Rate by County or City Name

As part of the **Sales & Use Rate Lookup** template, you can search for tax rate information by providing the name of a particular jurisdiction.

**To search tax rate by county or city name:**

1. Access the Sales & Use Rate Lookup screen.
2. Click the **By State, County, City** link.
3. Select a state to search from the **State** menu.
4. Enter either a city name or county name. Do not enter names in both fields.
5. Click **Search**.

   A summary screen displays a table of **Sales and Use Rates** for the city or county you selected.

# Searching Tax Rate by Zip Code

As part of the **Sales & Use Rate Lookup** template, you can search for tax rate information by Zip code.

**To search for tax rate by Zip code:**

1. Access the Sales & Use Rate Lookup screen.
2. Click the **By Zip Code** link.
3. Enter the Zip code of the location you wish to search, and then click **Search**.

   A summary screen displays a list of Sales & Use Rates for the chosen Zip code.

# Searching FASB Codification

Use the **FASB Codification** templates to find specific FASB content. There are four **FASB Codification** templates:

- **Search FASB Codification by Topic Title and Keywords** (**FASC Topic Title**)
- **Search FASB Codification by Any Combination of Topic, Subtopic, and/or Section Numbers and Keyword** (**FASC Number**)
- **Search FASB Codification Pending Content by Topic Title and Keywords** (**FASC Pending**)
- **FASB Superseded Standards and Nonauthoritative Literature** (**Superseded Stds**)

The **FASB Codification** templates are accessible from either the **Home** screen or the **Search** screen.

### Searching by FASC Topic Title

1. Access **FASB Codification** in one of the two following ways:
   - On the **Home** screen, select the **Accounting & Auditing** view, and then click **Search FASB Codification** in the **Search Tools** pane.
   - On the **Search** screen, select the **Accting, Audit & Corp Finance** practice area, and then click **FASB Codification** on the left navigation bar.
2. On the left navigation bar, click **FASC Topic Title**.
3. From the **Topics** drop-down list, select the topic that you want to search.
4. Select any optional search filters that you want to apply:
   - **Include Prior Code**
   - **Include Intersection Subtopics**
   - **Include Proposed Accounting Standards Updates**
   - **Include Other Exposure Documents**
   - **Include Deprecated Exposure Documents**
   - **Include Accounting Standards Updates**
   - **Exclude SEC Materials**
5. Enter keywords in the **Keywords** field to help further filter your search.(This is an optional step. The search will return results if you have provided a topic.)
6. Click **Search** to complete the search and view results.

### Searching by FASC Number

1. Access **FASB Codification** in one of the two following ways:

- On the **Home** screen, select the **Accounting & Auditing** view, and then click **Search FASB Codification** in the **Search Tools** pane.
- On the **Search** screen, select the **Accting, Audit & Corp Finance** practice area, and then click **FASB Codification** on the left navigation bar.

2. On the left navigation bar, click **FASC Number** .
3. Enter any combination of **Topic**, **Subtopic**, and **Section** numbers in the **Codification Numbers** section.
4. Select any optional search filters that you want to apply:
   - **Include Prior Code**
   - **Include Proposed Accounting Standards Updates**
   - **Include Other Exposure Documents**
   - **Include Deprecated Exposure Documents**
   - **Include Accounting Standards Updates**
   - **Exclude SEC Materials**
5. In the **Keyword in Document Title/Heading** field, further filter your search by entering keywords to be found in a document's title or heading. (This is an optional step. The search will return results if you have provided any codification numbers.)
6. Filter your search further by selecting an area of accounting standards from the **Select Area** drop-down list.
7. In the **Keywords** field, further filter your search by entering keywords to be found anywhere in a document.(This is an optional step. The search will return results if you have provided any codification numbers.)
8. Click **Search** to complete the search and view results.

### Searching by FASC Pending

1. Access **FASB Codification** in one of the two following ways:
   - On the **Home** screen, select the **Accounting & Auditing** view, and then click **Search FASB Codification** in the **Search Tools** pane.
   - On the **Search** screen, select the **Accting, Audit & Corp Finance** practice area, and then click **FASB Codification** on the left navigation bar.
2. On the left navigation bar, click **FASC Pending**.
3. From the **Topics** drop-down list, select the topic that you want to search.
4. Enter keywords in the **Keywords** field to help further filter your search. (This is an optional step. The search will return results if you have provided a topic.)

5. Click **Search** to complete the search and view results.

### Searching by Superseded Standards

1. Access **FASB Codification** in one of the two following ways:
    - On the **Home** screen, select the **Accounting & Auditing** view, and then click **Search FASB Codification** in the **Search Tools** pane.
    - On the **Search** screen, select the **Accting, Audit & Corp Finance** practice area, and then click **FASB Codification** on the left navigation bar.
2. On the left navigation bar, click **Superseded Stds**.
3. Select the sources and document types that you want to search.
4. Click **Next**.
5. Enter keywords or a citation number as additional search filters. You must fill in at least one of the two fields.
6. Click **Search** to complete the search and view results.

# Searching GAAP Reporter

Use the **GAAP Reporter** templates to find specific GAAP content. There are two **GAAP Reporter** templates available:

- **Search GAAP Reporter Components by Keyword** (**GAAP Rptr Keyword**)
- **Search GAAP Reporter Explanations by Any Combination of Topic, Subtopic, and/or Section and Keywords** (**GAAP Rtpr Number**)

You can access the **GAAP Reporter** templates from the **Home** screen or the **Search** screen.

### Accessing the GAAP Reporter templates from the Home screen

1. Select **Accounting & Auditing** from the **Current View** drop-down list.
2. Click **GAAP Reporter** in the **Search Tools** pane.

### Accessing the GAAP Reporter templates from the Search screen

1. Select **Accting, Audit & Corp Finance** from the **Practice Area** drop-down list.
2. Click **GAAP Reporter** in the upper area of the left navigation bar.

### Searching GAAP Reporter Components by Keyword

1. Click **GAAP Reporter Keyword** on the left navigation bar.
2. In the **Search GAAP Reporter Components by Keyword** template, enter search keywords in the **Keywords** field.
3. Select either the **Intuitive Search** or **Terms & Connectors** method to perform the search.
4. Click **Thesaurus/Query Tool** if you want to use more advanced keyword search features.
5. Select the document types you want to include in your search.
6. Click **Search** to complete the search and view results.

### Searching GAAP Reporter Explanations by Any Combination of Topic, Subtopic, and/or Section and Keywords

1. Select **GAAP Reporter Number** on the left navigation bar.
2. In the **Search GAAP Reporter Explanations by Any Combination of Topic, Subtopic, and/or Section and Keywords** template, enter your search criteria in the form of codification numbers or keywords or both.

   Enter any combination of **Topic**, **Subtopic**, and **Section** numbers in the **Codification Numbers** section.

   Enter search keywords in the **Keywords** field.

   Select either the **Intuitive Search** or **Terms & Connectors** method to perform the search.

   Click **Thesaurus/Query Tool** if you want to use more advanced keyword search features.

3. Click **Search** to complete the search and view results.

**Note**: A icon on the title of a search result indicates the presence of expert guidance in that explanation (in the form of an observation, illustration, caution, etc.).

# Searching IFRS Reporter

Use the **IFRS Reporter** templates to find specific IFRS content. There are two **IFRS Reporter** templates available on the **Accting, Audit, & Corp Finance Search** screen:

- **Search IFRS Reporter Components by Keyword** (**IFRS Rptr Keyword**)
- **Search IFRS Reporter Explanations by Standard and/or Keyword** (**IFRS Explanations**)

### Searching IFRS Reporter Components by Keyword

1. On the **Search** screen, select the **Accting, Audit & Corp Finance** practice area.
2. Click **IFRS Reporter** in the upper area of the left navigation bar.
3. Click **IFRS Rptr Keyword** on the left navigation bar.
4. In the **Search IFRS Reporter Components by Keyword** template, select the document types you want to include in your search.
5. Enter search keywords in the **Keywords** field.
6. Select either the **Intuitive Search** or **Terms & Connectors** method to perform the search.
7. Click **Thesaurus/Query Tool** if you want to use more advanced keyword search features.
8. Click **Search** to complete the search and view results.

### Search IFRS Reporter Explanations by Standard and/or Keyword

1. On the **Search** screen, select the **Accting, Audit & Corp Finance** practice area.
2. Click **IFRS Reporter** in the upper area of the left navigation bar.
3. Click **IFRS Explanations** on the left navigation bar.
4. In the **Search IFRS Reporter Explanations by Standard and/or Keyword** template, select **IFRS** (International Financial Reporting Standard) or **IAS** (International Accounting Standard) to indicate the type of standard you want to search.
5. Enter your search criteria in the form of a citation number or keywords or both.

   Enter a citation number in the **Citation** field.

   Enter search keywords in the **Keywords** field.

   Select either the **Intuitive Search** or **Terms & Connectors** method to perform the search.
6. Click **Thesaurus/Query Tool** if you want to use more advanced keyword search features.
7. Click **Search** to complete the search and view results.

# Searching Selected SEC Filings

Use the **Search Selected SEC Filings** template to conduct a keyword search in Checkpoint's SECPlus content. You can access the **Search Selected SEC Filings** template from the **Home** screen or from the **Search** screen.

### To access the template from the Home screen:

1. Select **Accounting & Auditing** from the **Current View** drop-down list.
2. Click **Search Selected SEC Filings** in the **Search Tools** pane.

### To access the template from the Search screen:

1. Select **Accting, Audit & Corp Finance** from the **Practice Area** drop-down list.
2. Click **SECPlus** on the left navigation bar.
3. Click **Selected SEC Filings** on the left navigation bar.

### To use the Search Selected SEC Filings template:

1. Enter search keywords in the Keywords field (optional).
2. Select either the **Intuitive Search** or **Terms & Connectors** method to perform the search.
3. Click Thesaurus/Query Tool if you want to use more advanced keyword search features.
4. From the **Forms** drop-down list, select the SEC form you want to search or choose **All Forms**.

   After selecting an SEC form, you have the option to select a form component or financial statement by clicking the **Change** link next to the **Components** field, selecting the component you want to include from the **Checkpoint Select Component** window, and then clicking **OK**.
5. Specify a filing date range to limit the search results by selecting a period from the **Filing Date** drop-down list, or by entering the date range in the **From** and **To** fields. (optional)
6. Select an accelerated filing status from the **Accelerated Filing Status** drop-down list or choose **All**.
7. In the **Companies** area, limit your search to specific companies by one of the following methods:
   - Select a group of companies from the **Company Group** drop-down list. A "company group" contains one or more companies that you combine into a labeled group by clicking **Create Group**. You can click **Manage Groups** to edit and maintain an existing company group.
   - Specify one or more companies in the **Company Names** box. Type company names in the text box or click **Find Companies** for help in identifying companies. Separate multiple names with a comma or semicolon.
   - Specify the ticker symbol of a company in the **Ticker Symbols** field. Separate multiple ticker symbols with a comma or semicolon.
8. To search one or more industries, enter the 4-digit SIC code for each industry. Separate multiple SIC codes with a comma or semicolon. Click **Find Industry Codes** to find specific industry codes.

9. Click the **Search** button to launch the search or select **Clear All** to reset all of the search criteria.

# Searching WG&L Analysis

Use the SECPlus template **Search WG&L Analysis** to conduct a search within specific Financial Reporting & Management materials.

1. On the **Search** screen, select **Accting, Audit & Corp Finance** from the **Practice Area** drop-down list.
2. Click **SECPlus** on the left navigation bar.
3. Click **WG&L Analysis** on the left navigation bar.
4. In the **Search WG&L Analysis** template, select the sources you want to include in your search.
5. From the **Forms** drop-down list, select the SEC form you want to include in your search, or choose **All Forms**.

   After selecting an SEC form, you have the option to select a form component or financial statement by clicking the **Change** link next to the **Components** field, selecting the component you want to include from the **Checkpoint Select Component** window, and then clicking **OK**.
6. If you want to include keywords, enter search keywords in the Keywords field.
7. Select either the **Intuitive Search** or **Terms & Connectors** method to perform the search.
8. Click Thesaurus/Query Tool if you want to use more advanced keyword search features.
9. Click **Search** to launch your search.

# Searching FRM Source Materials

Use the **Search FRM Source Materials** template to conduct a search within specific Financial Reporting & Management reference documents.

1. On the **Search** screen, click **Accting, Audit & Corp Finance** on the **Practice Area** drop-down list.
2. Click the **SECPlus** link on the left navigation bar.
3. Click **FRM Source Materials** on the left navigation bar.
4. In the **Search FRM Source Materials** template, select the document types that you want to include in your search.
5. From the **Forms** drop-down list, select the SEC form you want to search or choose **All Forms**.

   After selecting an SEC form, you have the option to select a form component or financial statement by clicking the **Change** link next to the **Components** field, selecting the component you want to include from the **Select Component** window, and then clicking **OK**.
6. If you want to include keywords, enter your search keywords in the Keywords field.
7. Select either the **Intuitive Search** or **Terms & Connectors** method to perform the search.
8. If needed, click the Thesaurus/Query Tool for more advanced search features.
9. Click **Search** to launch your search.

# Using the SECPlus Create Group Wizard

When using the **Search Selected SEC Filings** template to perform searches of SEC filings, you can create and use a custom group of companies to filter your search.

1. Click the **Create Group** link in the **Companies** section of the template.
2. In the **Create Group** window, identify a company that you want to include in the company group by typing its name in the **Company Name** field or its ticker symbol in the **Ticker Symbol** field. If you do not know the full company name, enter the first part of the name. The wizard will help you identify the full correct name when you click **Next**.
3. Select an accelerated filing status from the **Accelerated Filing Status** drop-down list or choose **All**.
4. You can use the **SIC (Industry) Code** field if you want to select companies from a specific industry. Click **Find Industry Codes** to browse for a specific Industry code.
5. Click **Next** to go to the results list. Any company names matching the information you entered will display.
6. Select companies that you want to add to your group. If you want to view additional information about a company, click the "i" symbol next to the company name.
7. Click the **Next** button.
8. If you want to add more companies to the group, click **Find More** and repeat Steps 2 through 7.
9. If you want to remove one or more companies from the final list, select the companies and click **Delete**.
10. Provide a name for your company group in the **Company Group Name** field.
11. Click **Finish** to create a group consisting of the selected companies.

Your group will now be available for selection in the **Company Group** drop-down list on the **Search Selected SEC Filings** screen.

# Using the SECPlus Manage Groups Wizard

You can manage your company groups in **SECPlus** by adding or deleting companies or changing the group name in the **Manage Groups** wizard.

1. Click the **Manage Groups** link in the **Companies** section of the **Search Selected SEC Filings** template.
2. In the **Manage Groups** window, select the group you want to manage from the **Company Group** drop-down list.
3. To remove a company from the group, select the company name and click **Delete**.
4. To add companies to the group, click **Find More** and use the template to identify and select companies.
5. When you finish modifying your list of companies, click **Save** to save the group. Click **Save As** if you want to save the group under a new name. You can delete or rename the group by clicking the **Delete** or **Rename** links next to the **Company Group** field.
6. Click **Finish** to exit the **Manage Groups** window.

# Using the SECPlus Find Companies Wizard

When performing searches of SEC filings using the **Search Selected SEC Filings** template, you can use the **Find Companies** wizard to locate companies that you want to include in your search.

1. Click the **Find Companies** link in the **Companies** section of the template.
2. In the **Find Companies** window, identify a company that you want to include in the company group by typing its name in the **Company Name** field or its ticker symbol in the **Ticker Symbol** field, or select a company group from the **Company Group** drop-down list. If you do not know the full company name, enter the first part of the name. The wizard will help you identify the full correct name when you click **Next**.
3. Select an accelerated filing status from the **Accelerated Filing Status** drop-down list or choose **All**.
4. You can use the **SIC (Industry) Code** field if you want to select companies from a specific industry. Click **Find Industry Codes** to browse for a specific Industry code.
5. Click **Next** to go to the results list. Any company names matching the information you entered will display.
6. Select companies that you want to include in your SEC filings search. If you want to view additional information about the company, click the "i" symbol next to a company name.
7. Click the **Next** button. A list of the companies you have selected to add to your SEC filings search will display.
8. Click **Find More** if you want to find more companies to include in your SEC filings search. You can also save the results list as a company group by clicking **Save As Group** and entering a group name.
9. Click **Finish** when you are ready to include the found companies in your SEC filings search. The companies will be added to the **Company Names** field in the **Search Selected SEC Filings** template.

# Searching AICPA Professional Standards

Use the **Search AICPA Professional Standards** template to conduct a keyword search within selected AICPA sources.

You can access the **Search AICPA Professional Standards** template from either the **Home** screen or the **Search** screen.

**To access the template from the Home screen:**

1. Select **Accounting & Auditing** from the **Current View** drop-down list.
2. Click **AICPA Professional Standards** in the **Search Tools** pane.

**To access the template from the Search screen:**

1. Select **Accting, Audit & Corp Finance** from the **Practice Area** drop-down list.
2. Click the **Search Other FRM Products** link on the left navigation bar.
3. Click **AICPA Prof. Standards** on the left navigation bar.

**To use the Search AICPA Professional Standards template:**

1. In the **Search AICPA Professional Standards** template, select the document types you want to include in your search.
2. Enter search keywords in the **Keywords** field.
3. Select either the **Intuitive Search** or **Terms & Connectors** method to perform the search.
4. Click **Thesaurus/Query Tool** if you want to use more advanced keyword search features.
5. Click **Search** to launch your search.

# Searching AICPA Technical Practice Aids

Use the **Search AICPA Technical Practice Aids** template to conduct a keyword search within selected AICPA sources.

You can access the **Search AICPA Technical Practice Aids** template from either the **Home** screen or the **Search** screen.

**To access the template from the Home screen:**

1. Select **Accounting & Auditing** from the **Current View** drop-down list.
2. Click **AICPA Technical Practice Aids** in the **Search Tools** pane.

**To access the template from the Search screen:**

1. Select **Accting, Audit & Corp Finance** from the **Practice Area** drop-down list.
2. Click the **Search Other FRM Products** link on the left navigation bar.
3. Click **AICPA Tech. Practice Aids** on the left navigation bar.

**To use the Search AICPA Technical Practice Aids template:**

1. In the **Search AICPA Technical Practice Aids** template, select one or more document types that you want to include in your search.
2. Enter search keywords in the **Keywords** field.
3. Select either the **Intuitive Search** or **Terms & Connectors** method to perform the search.
4. Click **Thesaurus/Query Tool** if you want to use more advanced keyword search features.
5. Click **Search** to launch your search.

# Using the Federal Accounting Standards Advisory Board (FASAB) Search

Use the **Federal Accounting Standards Advisory Board** templates to search for documents by citation within select FASAB sources. You can access the FASAB templates from the **Search** screen.

**To access the templates from the Search screen:**

1. Select **Accounting, Audit & Corp Finance** from the **Practice Area** drop-down list.
2. Click **Find by Citation** on the left navigation bar.
3. Click **More...** on the left navigation bar.
4. Select **FASAB (Federal Accounting Standards Advisory Board)** from the list of templates displayed on the screen.

   The **FASAB Templates Available** screen appears with a list of the templates available.
5. Enter your search criteria in the form of a citation number in the search box for the required template.

   An **Example** of citation number formats is available for each template.
6. Click **Search** to launch your search.

**To access FASAB content from the Home screen:**

1. Select **Accounting & Auditing/Corporate Finance/Pension Compensation & Benefits** from the **Current View** drop-down list.
2. Click **FASAB(Federal Accounting Standards Advisory Board)** in the **Standards and Regulations** pane.

   You are directed to FASAB content in the **Table of Contents**.
3. Search the **Table of Contents** for the required FASAB information.

# Using the IASB Advanced Search Template

Use the **IASB Advanced Search** template to conduct keyword and citation searches within selected IASB sources. You can access the **IASB Advanced Search** template from the **Home** screen or from the **Search** screen.

**To access the template from the Home screen:**

1. Select **Accounting & Auditing** from the **Current View** drop-down list.
2. Click **IASB Advanced Search** in the **Search Tools** pane.

**To access the template from the Search screen:**

1. Select **Accting, Audit & Corp Finance** from the **Practice Area** drop-down list.
2. Click **Search Other FRM Products** on the left navigation bar.
3. Click **IASB Advanced Search** on the left navigation bar.

**To use the IASB Advanced Search template:**

1. Select the document types you want to include in your search.
2. Click **Next**.
3. Enter your search criteria in the form of keywords or citation number or both.

   If you want to include keywords, enter search keywords in the Keywords field.

   Select either the Intuitive Search or Terms & Connectors method to perform the search.

   Click Thesaurus/Query Tool if you want to use more advanced keyword search features.

   Enter a citation number in the **Citation Number** field. Click **Examples** to see citation number format examples.
4. Optionally, you can specify **From** and **To** dates in the **Date Range** section. This will limit the search to the specified time period.
5. Click **Search** to launch your search.

# Using the PCAOB Advanced Search Template

Use the **PCAOB Advanced Search** template to conduct keyword and citation searches within selected PCAOB sources. You can access the **PCAOB Advanced Search** template from the **Home** screen or from the **Search** screen.

**To access the template from the Home screen:**

1. Select **Accounting & Auditing** from the **Current View** drop-down list.
2. Click **PCAOB Advanced Search** in the **Search Tools** pane.

**To access the template from the Search screen:**

1. Select **Accting, Audit & Corp Finance** from the **Practice Area** drop-down list.
2. Click **Search Other FRM Products** on the left navigation bar.
3. Click **PCAOB Advanced Search** on the left navigation bar.

**To use the PCAOB Advanced Search template:**

1. Select the document types you want to include in your search.
2. Enter your search criteria in the form of citation number or keywords or both.

   Enter a citation number in the **Citation Number** field. Click **Examples** to see citation number format examples.

   If you want to include keywords, enter search keywords in the Keywords field.

   Select either the **Intuitive Search** or **Terms & Connectors** method to perform the search.

   Click Thesaurus/Query Tool if you want to use more advanced keyword search features.
3. Click **Search** to launch your search.

# About International Trade Library

The information market for international trade compliance is attractive because of its estimated size and future growth prospects. A trade library serves the needs of current Checkpoint tax and accounting customers (primarily professionals in corporate tax, finance, or legal departments), accounting and law firms with trade practices, trade professionals, and corporate trade specialists. An integrated offering of primary sources, analytical materials, and workflow tools, the Checkpoint model, fills an unmet need in the marketplace.

The International Trade Library practice area provides keyword, find by citation, and date range searches. Additionally, Search templates are also present on the left navigation bar to help guide you through the process of searching International Trade materials. Click on the Search template that suits your need and perform a search by filling in requested information. Based on the choices you make, you will get an outcome most appropriate to your search requirements.

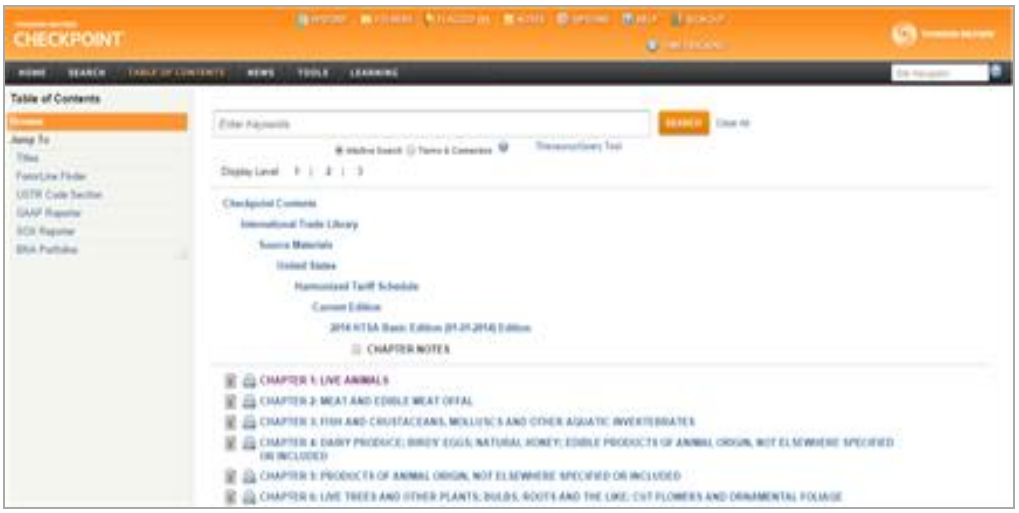
The Harmonized Tariff Schedule of the United States (HTSUS) content provides a special document format that you will find useful when you need to determine tariff classifications . On the left navigation bar, under **Go To** there is also a link to the Global Trade Analyzer, a third party product used to simplify a search in HTSUS.

# Harmonized Tariff Schedule of US (HTSUS)

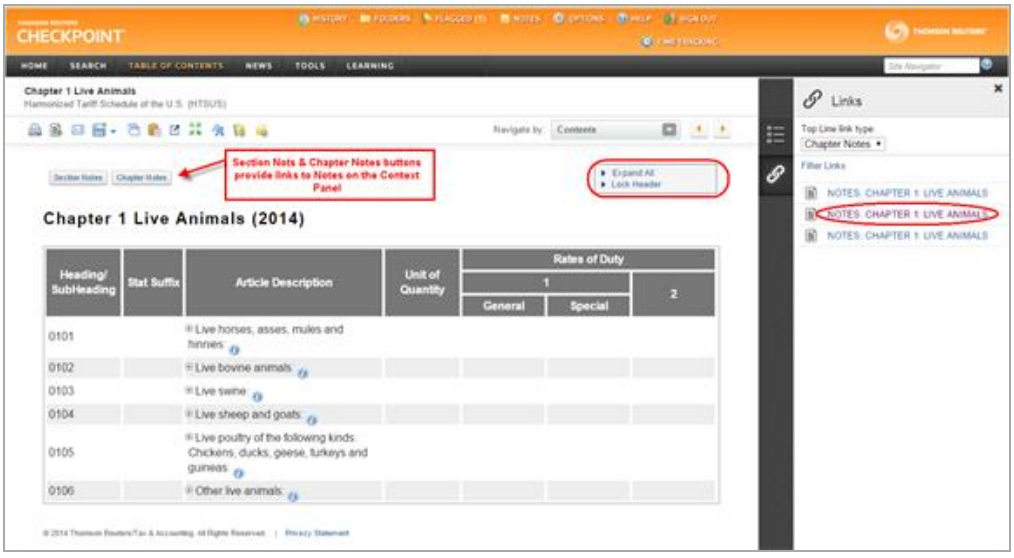
The **Harmonized Tariff Schedule of the United States (HTSUS)** is the primary resource for determining tariff classifications for goods imported into the United States. Content is housed in the HTSUS database and functions as a Finder tool or HTSUS look-up table that resides inside a Checkpoint document that includes specific look-up features and functionality. The look-up tool allows users to make classification decisions about the products they are importing/exporting.

In the HTSUS, goods are logically arranged so they appear in headings beginning with the most basic substances, and ending with more advanced manufactured goods. This progression is found within the chapters and the sections.

Following is an example of a Checkpoint Table of Contents search of Chapter 1 of the HTSUS:




If you open Chapter 1, for example, notice how the headings are displayed in large gray columns:

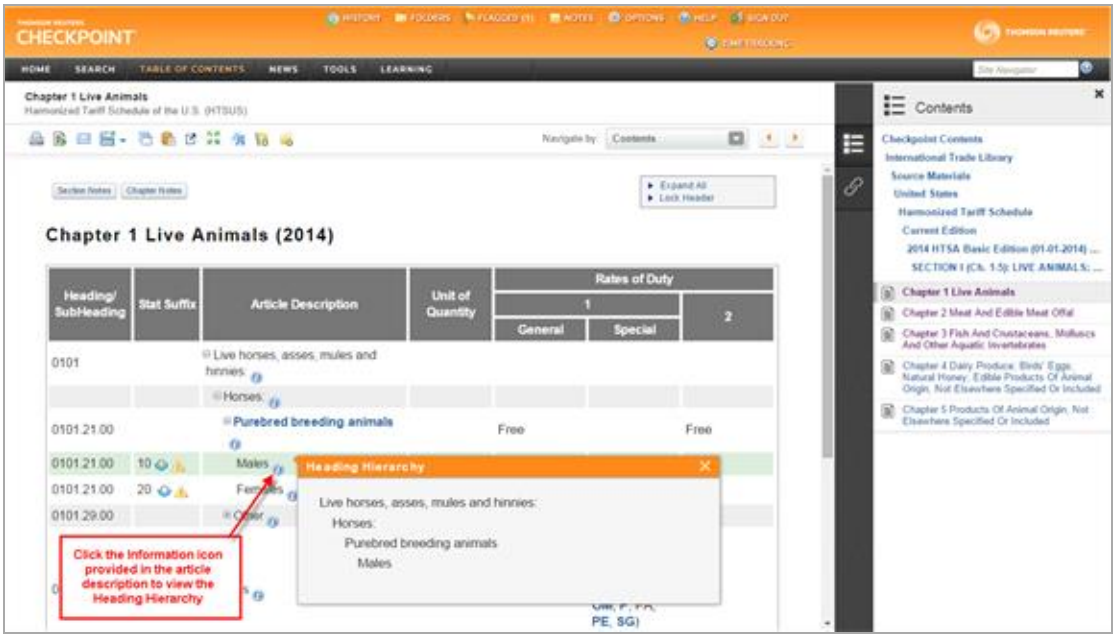


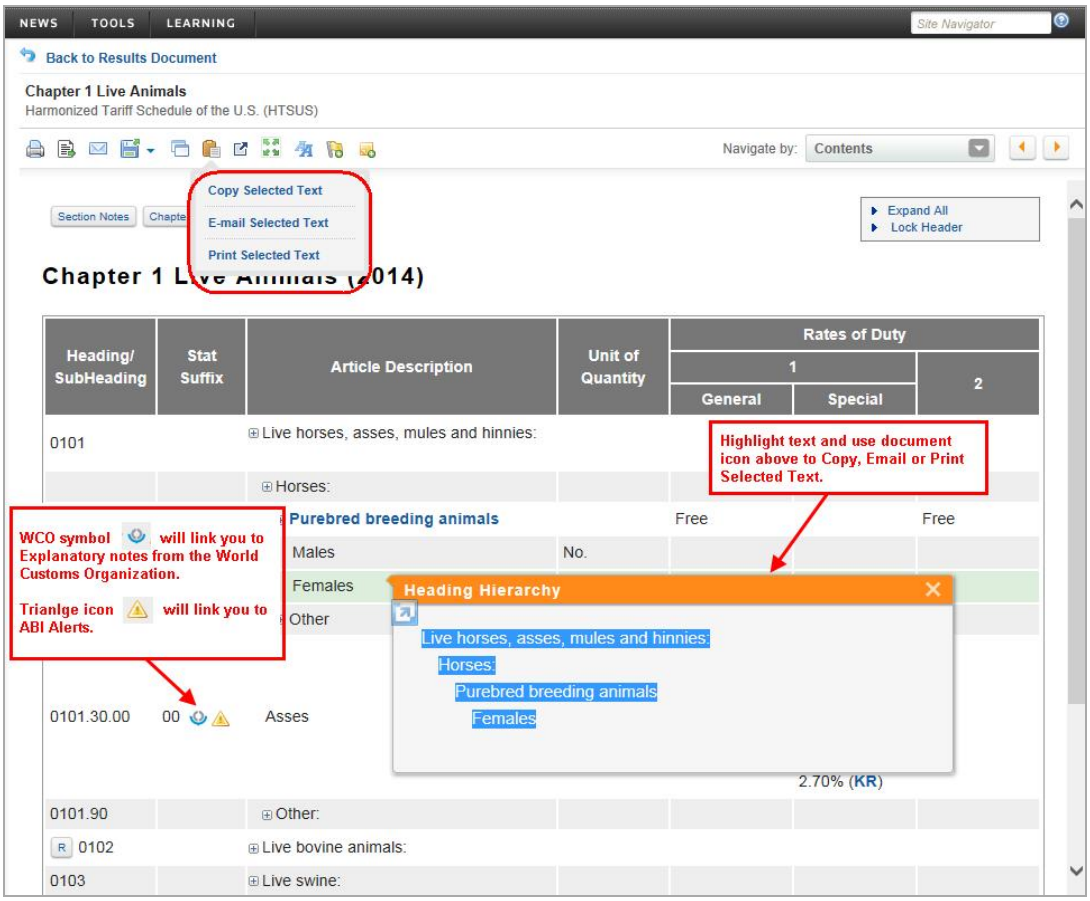
Circled above are two top line links: **Section Notes** and **Chapter Notes.** From these links, you can obtain more specific information about the section and chapter content. All headings and subheadings for HTSUS chapters in Checkpoint will expand and collapse to allow for easy comparison of text at the same level.

- Click + to expand a heading or subheading.
- Click - to collapse a heading or subheading.

**Note**: With one click of the **Expand All** feature (red arrow above), you can open all of the subtopics for each of the listed items.

In the following example, clicking the icon (Related Rulings) provides a listing in the left pane of related custom rulings.






Clicking the Explanatory Notes (WCO) icon links to a preview window with Explanatory Notes for the associated heading. The triangle icon links to a preview window with alert information from the ABI database. The icon shows the hierarchy of the heading next to it.

# Viewing and Navigating Search Results

After completing a search, the results are displayed on the **Search Results** screen.

Three views are available on the **Search Results** screen:

- Source List view categorizes results by the sources you defined in your search.
- All Documents view lists all documents that meet search parameters.
- Table of Contents view presents a hierarchy that drills down to specific documents.

**Source List** is the default view when you search from the **Home** screen or **Search** screen, but you can change the default to **All Documents** or **Table of Contents** at any time using the **Set Default** drop-down menu or from the Options screen.

**Table of Contents** is the default view when you search from the **Table of Contents** screen.

**Note**: Links to previously viewed documents appear in purple text. Checkpoint clears all previously viewed documents every 24 hours at midnight and changes the text back to blue.

## Features Available on Every View

| Feature | Purpose |
|---|---|
| **Keyword** | Displays the terms you used to define your search. You can re-define the search at any time by changing or adding terms to the **Keyword** field and clicking the adjacent **Search** button. |
| **Save/Schedule Search** | Allows you to save your search parameters to run again later. At the same time, you can schedule your search parameters to run later. |
| **Related Courses** | Lets you browse and register for a wide variety of training. |
| **# total results** | Gives the number of results from running the search. |
| **Set Default** | Lets you permanently select the default view for the **Search Results** screen. The options are All Documents, Source List, Table of Contents, and Use Last. |
| | Hover your mouse pointer over this icon next to a regulation document name to see the effective date of the regulation. When you see this icon in Checkpoint analysis it draws attention to additional insight guidance provided by Checkpoint's experienced editors. The editors are stepping out of the analysis or explanation of law and giving researchers important insight to help clarify a gray area of tax law. |
| | A note icon to the right of a document indicates there is one or more notes or highlights in the document. You can click the icon to view a pop-up window containing the notes and highlights. |

## Features Available Depending on the View Selected

| Feature | View | Purpose/Options |
|---|---|---|
| **View Hits Only/ View All Results** icon | **Source List**<br>**Table of Contents** | **View hits only** is the default setting. You can toggle between these views on the **Search Results** screen or change the search/display settings at any time on the Options screen. When this feature is turned on, you see descriptions for documents returned in the search. If you turn it off, you only see the titles of documents. |
| **Show Words Around Hits/Hide Words Around Hits** icon | **All Documents**<br>**Source List** | **Show Words Around Hits** is the default setting for this icon. Checkpoint provides context for results by showing 25 words around the first keyword occurrence in a document. You can toggle to hide this view on the **Search Results** screen, or change the search/display setting at any time on the Options screen.<br>**Note**: The **Show Words Around Hits** feature does not apply to documents to which you do not subscribe. |
| **Display Level: 1, 2, 3** option | **Table of Contents** | **Level 1** is the default setting, which displays only the top level of **Search Results** within the specified sources. You can select another display level to drill down to additional levels. Selecting Level 3 is a good way to see subtopics beneath full topics. |
| **View all documents in a level** | **Table of Contents** | When viewing search results in the **Table of Contents** view, you can select to see all documents from any TOC level without drilling down into each item. To do this you click the number of hits following the folder name, and Checkpoint displays a list of all documents found in the subfolders. |
| **Sort by: Relevance / Table of Contents** drop-down list | **All Documents**<br>**Source List** (on drill-down)<br>**Table of Contents** (on drill-down) | **Relevance** is the default setting, triggering a complex formula that rates individual documents in relation to other documents in the results list. Each document displays from one to five gold stars, with five stars indicating documents that are most relevant to your search parameters. The **Table of Contents** option displays documents in the order in which they appear in the source. For example, if the source is a code section, the **Table of Contents** sort order would be sections "167 ... 168 ...169," while the **Relevance** sort order might be "168 .. 167 ... 169." You can change the sort order at any time by clicking the **Sort by:** links on the **Search Results** screen. |
| **Document Tools** | **All Documents**<br>**Source List**<br>**Table of Contents** (on drill-down) | The document tools provide a quick way to print, export, or save complete documents to folders. You can select specific text from a document to print, copy, or email. You can also flag documents and add notes to documents. |

### Print Documents

1. Select the check box next to each document title you want to print.
2. Click the **Print** icon in the document tools. The selected documents appear in a window with source and document citations, along with a **Print** dialog box.
3. Click **Print**.

### Export Documents

1. Select the check box next to each document title you want to export.
2. Click the **Export** icon in the document tools. The **Export** dialog box appears.
3. Review/change the default settings for format and links, and then click **Export**.

   The browser **File Download** dialog box appears.
4. Click **Open** to view the exported documents or **Save** to save to your local PC.

   **Note**: The export format for the document is defined in your Checkpoint Print/Export/E-mail setting on the **Options** screen.
5. Click **X** to close the dialog box.

### Save to Folders

1. Select the check box next to each document title you want to save.
2. When you click the drop-down arrow next to the **Save** icon, you get a menu with choices to **Save** to the default folder or **Save As** to a different folder.

   If you click **Save**, the document is saved to the current folder on the **Folders** screen and you are finished.

   If you click **Save As**, the **Save Document** window opens, where you can select another folder. Continue with Step 3.
3. On the **Save Document** window, click **Change Folder**.
4. When the **Change Folder** window opens, you can either select another folder from the list or click a link to create a new folder.

   If you want to select another folder, click the folder name and click **OK**.

   If you want to create a new folder, click **Create New Folder**. When the **Create Folder** window opens, enter the new folder name, select a location, and click **Create**. The new folder is added to the **Change Folder** window. Click the new folder name and click **OK**.
5. Optionally, on the **Save Document** window, you can enter a **Note** for the document. If you enter a note, the note is added to the top of the document.
6. On the **Save Document** window, click **Save** to add the document to the selected folder on the **Folders** screen.

### Flag Documents

1. Click the **Flag** icon in the document tools.

   Checkpoint adds the flagged document to the **Flagged Documents** screen.

2. To access flagged documents, click **Flagged** in the top toolbar.
3. To unflag a document, in the open document, click the **Flag** icon in the document tools again.

# Understanding Source List View on Search Results

**Source List** is one of three views on the **Search Results** screen. This view summarizes your search results according to the number of documents found in each of the sources you searched. You can expand and collapse each source to navigate the results. When you click the + next to a source, the three most relevant documents within that source are displayed.

**Note**: Source List is the default view of the search results when you search from the **Search** screen or **Home** screen. You can change the default view in the Search/Display area of the Options screen.

The **Source List** view displays the following:

- List of **Sources** that match the keywords you included in your search. By default, only sources that contain documents with hits are shown.
- Total number of documents found as a result of your search.
- Number of documents found in each source that satisfy your search criteria.
- Green stars next to sources containing one or more of the top ten documents.
- Gold stars that rank each document's relevance, with five stars being the most relevant.
- A note icon to the right of a document which indicates there is one or more notes or highlights in the document. You can click the icon to view a pop-up window containing the notes and highlights.

The following features apply to the **Source List** view:

- To view a list of all related documents, click a source name in the results list. Checkpoint displays the first 50 documents followed by a View More link to see the next 50.
- When the source is displayed, you can click the X next to the source name to go back to the full source list.
- To display all source documents included in your search, including those with no hits, click the **View all results** icon.
- To view the three most relevant documents associated with a source, click the plus sign to expand the source.
- To view all search results within a source, click **Display all X documents** beneath the three most relevant documents. The source will be displayed at the top of the list followed by the documents in the sort order you have selected.
- To view a document's content, click the document title.
- To save or schedule the current search, click **Save/Schedule Search** in the upper right of the screen.
- To modify a search, see Modifying a Search.
- To view related courses, click the **Related Courses** link at the top middle of the screen.

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# Understanding the Document Screen

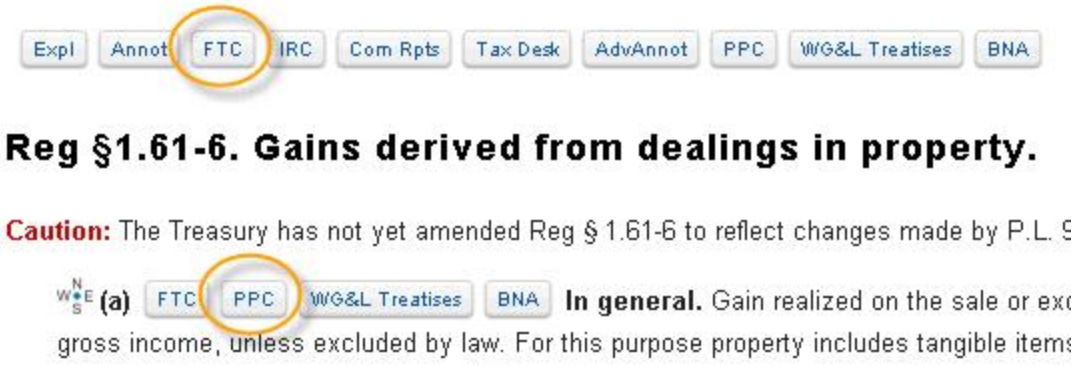
When you select a document from the **Search Results** screen, the **Document** screen displays the complete text of a document along with tools to navigate the contents and open related documents. The two main parts of the Document screen are the **text pane** on the left and the **Context Panel** on the right.

## Text Pane

The left side of the **Document** screen displays the document text. Keywords used in the document search are highlighted in yellow in the text. All documents include at the top of the document pane. Additional navigation elements may be available within the document.

### Top Line and Side Line Links

Top line and side line links are a series of buttons across the top or on the left margin of some documents. You can click these buttons to display a list of related documents in the **Context Panel**. These links do not appear in all documents.

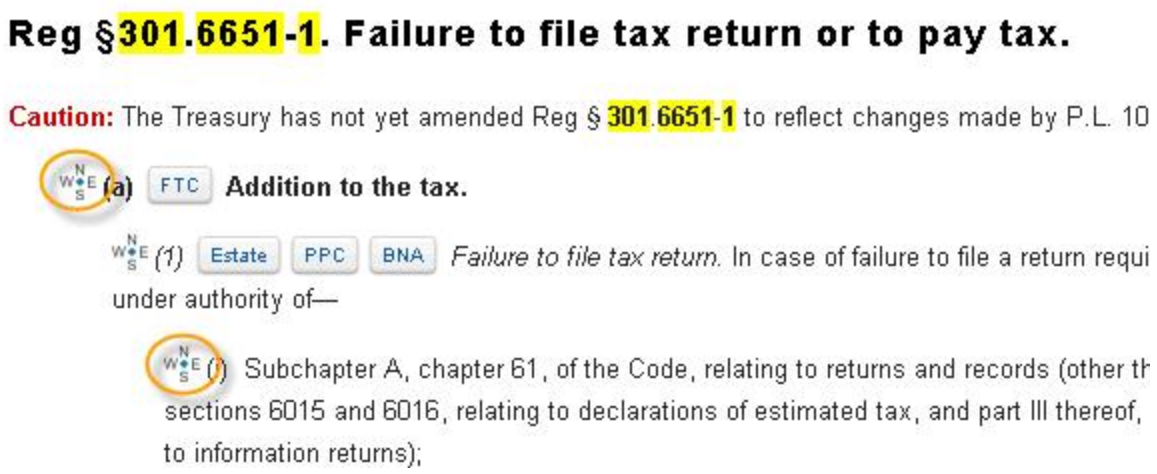



### Reference Links

Reference links reside within the text of the document and link to other related material.

### Deep Cite Locator

If you are browsing **Code** or **Regs** subsections, you can identify your exact location at any time. Simply hover your mouse over the nearest locator (compass) icon as shown below.


Reg §301.6651-1. Failure to file tax return or to pay tax.
Caution: The Treasury has not yet amended Reg § 301.6651-1 to reflect changes made by P.L. 10
(a) FTC Addition to the tax.
(1) Estate PPC BNA Failure to file tax return. In case of failure to file a return requi
under authority of—
(i) Subchapter A, chapter 61, of the Code, relating to returns and records (other th
sections 6015 and 6016, relating to declarations of estimated tax, and part III thereof,
to information returns);

Back to Search Results

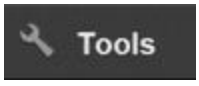
Click **Back to Search Results** to return to the last document viewed in the search results.

**Note**: To see all previously viewed search result screens within the current search, continuously click **Back to Search Results** till the required page is displayed.

## Context Panel

When you open a document, the **Context Panel** on the right contains features you can use to explore your document content. Not all features appear for every document. The feature tabs that are visible depend on whether the document is part of a search result or is opened by browsing the **Table of Contents**.To open a feature, click the tab. To close the feature, click the tab's associated icon (bullets, magnifying glass, wrench).

| Feature | Purpose |
|---|---|
| Contents | The **Contents** tab displays the location of the document within the **Table of Contents**. Each entry in the contents list is a link to the levels and sub-levels where the document is located. The outline links are jump links into the document. Document links outside of the outline are displayed in a preview window.<br><br>You may see "# Hidden Documents" on the **Contents** tab. The tab is designed to list the currently displayed document and its neighboring documents as they appear in the Table of Contents hierarchy. For example, if the document you have opened is the 11th document in the list, the **Contents** tab displays "10 Hidden Documents" so that the document you are viewing appears at the top of the list and you won't have to scroll through the first 10 to find it. To access the 10 "hidden" documents that come before your open document, just click the **Hidden Documents** link. |
| Search Results | The **Search Results** tab displays the topic and subtopics related to the viewed document. |

| Feature | Purpose |
|---|---|
| | The **Featured Development** tab appears at full topic-level only.<br><br>Lists all new articles and developments associated with the topic you are reviewing, pulled from Fed Taxes Weekly Alert and State & Local Updates. This tab automatically opens if there are new developments within the last two months. Items are listed by date and contain a headline and information about the document. If the item is related to an article, there will be a link to the article. If you click the link, a pop-up window displays a snippet of the article. You can then click a link to show the full article.<br><br>If there are no new developments associated with the viewed topic, the tab will be present but not open. If you open the tab, you will see a message that says "No new articles since [last update date]."<br><br>At the bottom of the new developments, there is a **Find More** link to go to the previous six months of featured developments. If there are no additional featured developments, you will see a message that says "No additional Featured Developments were found." |
| | The **Recommended Documents** tab appears for both topics and subtopics.<br><br>Provides links to recommended documents that are related to the displayed document. If there are no recommended documents associated with the viewed topic, the tab is not displayed. This tab appears at the topic and subtopic level. A maximum of three recommended documents are displayed for each subtopic. |
| | The **Learning** tab displays links to courses related to the document you are viewing. When you click a course link, the **Checkpoint Learning** registration screen opens. |
| | Appears only in documents with top line and/or side line links. Click this tab to display a list of associated documents for each top line and side line link type. Select a link type from the drop-down menu and select the document from the list to view the document text. You can top line and side line links by keyword using the Filter Links feature at the top of the Links tab. |
|  | The **Tools** tab appears for both topics and subtopics.<br><br>Lists all tools available in the displayed document. If there are no tools associated with the viewed topic, this tab will not be displayed. This tab lets you jump quickly to embedded tools, such as Create A Chart, Decision Tools (Document Assembly), and i-Tables. Tools are categorized by the type of tool and are displayed in the order they appear in the document. An icon is |

| Feature | Purpose |
| --- | --- |
| | displayed next to the tool title to show which type of tool it is. When you select a tool, the document scrolls to the location of the tool. |
| | Use the Charts tab when viewing a State and Local document to quickly create a chart using the State and Local create-a-chart feature. This tab is available for documents that contain chart data. |

**Note**:Links to previously viewed documents appear in purple text. Checkpoint clears all previously viewed documents every 24 hours at midnight and the text changes back to blue.

# Understanding Table of Contents View on Search Results

**Table of Contents** is one of three views on the **Search Results** screen. This view provides an outline view of categorized information. You can see all available information in a hierarchical structure of levels and sublevels.

**Note**: Table of Contents is the default view of the search results when you search from the **Table of Contents** screen. You can change the default view in the Search/Display area of the Options screen.

The **Table of Contents** view displays the following:

- List of **Sources** that match the keywords you included in your search. By default, only sources that contain documents with hits are listed.
- Total number of documents found as a result of your search.
- Number of documents found in each source that satisfy your search criteria.
- A note icon to the right of a document indicates there is one or more notes or highlights in the document. You can click the icon to view a pop-up window containing the notes and highlights.

The following features apply to the **Table of Contents** view:

- If you select **Display Level 2** or **Display Level 3** at the top of the results, Checkpoint expands the topics and shows the subtopics two levels or three levels down.
- To display all sources, including those with no hits, click the **View all results** icon.
- To display only sources with hits, click the **View Hits Only** icon.
- To view a document's content, click the document title.
- To save or schedule the current search, click **Save/Schedule Search** in the upper right of the screen.
- To modify a search, see Modifying a Search.
- To view related courses, click the **Related Courses** link at the top middle of the screen.
- If you click the total number of documents on the **Table of Contents** view, the documents are sorted and ranked by either **Relevance** or **Table of Contents** (depending on your **Sort by** setting) to your search criteria. Gold stars next to each document title indicate the relative score for your search query, with five gold stars being the most relevant.

# Understanding All Documents View on Search Results

**All Documents** is one of three views on the **Search Results** screen. Within this view, you have a choice of sorting results by **Relevance** or **Table of Contents**. You can quickly switch between the two using the **Sort By:** option at the top of the **Search Results** screen.

| | |
|---|---|
| **Sort By: Relevance** | Displays documents ranked in order of **Relevance** to your search criteria (starting with the most relevant, which is determined by a sophisticated algorithm that analyzes each document). Gold stars next to each document title indicate the relative score for your search query (with five gold stars being the most relevant). |
| **Sort By: Table of Contents** | Displays results in the order in which they appear in the table of contents of each source you specified in the search parameters. The source name appears in green text at the bottom of each item in the **Search Results** list. |

The Search/Display area of the **Options** screen lets you change the default setting to **All Documents**, **Table of Contents**, **Source List**, or **Use Last** method.

The **All Documents** view shows the following:

- The first 50 documents that contain your keywords. Click **View More** at the bottom of the page to display the next 50 documents.
- Title of documents that contain your keywords, followed by the first instance of keywords (highlighted in yellow) in the document, surrounded by the 25 words that immediately precede and follow the keywords to give you an idea of the context. (**Show Words Around Hits** is the default setting that enables this feature. If you want to disable the feature, you can click the **Hide Words Around Hits** icon in the document tools or you can change the setting in the Search/Display area of the **Options** screen.) Click the document title to view the document contents.
- The source for each document, identified in green text under each document title. When you click the source, the All Documents view is filtered to display only the documents within that source. A new label “Filtered By: Source Title” is added at the top of the document list. This source title has an X next to it which you can click to delete the filter and return to the full All Documents view.
- A note icon to the right of a document indicates there is one or more notes or highlights in the document. You can click the icon to view a pop-up window containing the notes and highlights.
- A check box before each document that allows you to select one or more documents and then use document tools to print, export, or save.

**Note**: Links to previously viewed documents appear in purple text. Checkpoint clears all previously viewed documents every 24 hours at midnight and the text changes back to blue.

# Using the Document Navigation Tools

Several navigation tools are available on the Document screen to help you browse and manage your search results. Some tools also appear on the Search Results screen.

## Navigate By / Right-Left Arrows

The **Navigate by:** drop-down list and **right-left arrows** in the upper right of the **Document** screen allow you to advance to the next **Best** selection or **Document** found by your search, the next document listed in the **Table of Contents**, or the next occurrence of a **Keyword** or **Explanations**.

Not all options appear on every document.

- If you accessed the document via the**Table of Contents** view, you can navigate by **Contents** only.
- If you accessed the document via the **All Documents** or **Source List** view, you can navigate by **Best**, **Document**, **Contents**, or **Keyword**.
- if you accessed the document by searching certain GAAP sources, you can navigate by **Document**, **Contents**, **Keyword** or **Explanations**.

To use this feature, select an option from the drop-down list, and then click the right or left arrow to move forward or back through the search results.

## Document Tools

The document tools are located at the top of the **Document** screen and **Search Results** screen. You can pass your mouse pointer over each icon to see a callout of its function. Not all of the tool options appear on every document.

### Document Screen Tools

The tools on the **Document** screen vary according to the type of search you performed and the sources you selected. Not all tools appear for all documents.

Click here to see descriptions of the tools on the Document screen.

| | |
|---|---|
| | Click to print the contents of the document. |
| | Click to export the contents of the document in HTML, MS Word, PDF, or RTF format. |

| | |
|---|---|
| | Click to e-mail the document to one or more recipients. |
| | Click to save the document to a folder. If you click the down arrow next to the icon, you can choose either **Save** or **Save As**. If you click **Save**, the document is saved to the current folder on the **Folders** screen. If you click **Save As**, the **Save Document** window opens, where you can select another folder or create a new folder. |
| | Click to open the document in a new window. |
| | Click to access a drop-down list that lets you copy, e-mail, print, highlight selected text, and add a note. You must select text in the document before this icon is enabled. |
| | Click to show permalinks within the document. |
| | Click to display the document in full-screen mode.Click the icon again to return it to regular mode. |
| | Click to open the **Document Display Options** pop-up window, where you can change screen and print options. Screen options include font, font size, show notes, show highlights, show navigate by, and change text width. Print options include font, font size, show notes, show highlights, show keyword hits and show compass icon . |
| | Click to flag a document. The document is added to the **Flagged Documents** screen, accessed from the top toolbar. |
| | Click to unflag a document. The document is deleted from the **Flagged Documents** screen, accessed from the top toolbar. |
| | Click to add a note to the document. |
| | Click to refresh a Checkpoint Catalyst™ topic, which collapses all expanded content back to the original condensed format. This icon refreshes only at the topic level (not the subtopic level). |

### Search Results Screen Tools

The tools on the **Search Results** screen vary according to whether you are in the **All Documents**, **Source List**, or **Table of Contents** view. Not all tools appear for all search results.

Click here to see descriptions of the tools on the Search Results screen.

| | | |
|---|---|---|
| | All Documents | Click to print selected documents. Click the check box next to each document you want to print. |

| | | |
|---|---|---|
| | Source List | |
| | All Documents<br>Source List | Click to export selected documents. Click the check box next to each document you want to export in HTML, MS Word, PDF, or RTF format. |
| | All Documents<br>Source List | Click to save selected documents. Click the check box next to each document you want to save. If you click **Save** from the drop-down list, the document is saved to the current folder on the **Folders** screen. If you click **Save As**, the **Save Document** window opens, where you can select another folder or create a new folder. |
| | All Documents<br>Source List | Click to flag selected documents. Click the check box next to each document you want to flag.The document is added to the **Flagged Documents** screen, accessed from the top toolbar. |
| | All Documents<br>Source List | Click to unflag selected documents. Click the check box next to each document you want to unflag.The document is deleted from the **Flagged Documents** screen, accessed from the top toolbar. |
| | All Documents<br>Source List | Click to show words around your keyword hits for all documents in the list. |
|  | All Documents<br>Source List | Click to hide words around your keyword hits for all documents in the list. |
| | Table of Contents<br>Source List | Click to view all results in the source list. |
| | Table of Contents<br>Source List | Click to view hits only in the source list. |

**To print a document:**

1. Click the **Print** icon from the document tools.
2. Select a printer.
3. Click **Print**.

> **Note**: The print format for the document is defined in the .

**To export a document:**

1. Click the **Export** icon from the document tools.

   The document **Export** dialog box appears.

2. Review/change the default settings for format and links, and then click **Export**.

   **Note**: The export format for the document is defined in the .

   The browser **Export Status** dialog box appears. Here, you can choose to:

   - Wait on the same page till the **Export Complete** dialog box appears and click **Download**, OR
   - Click the **Minimize and Continue with Research** button and continue with your research.
     When you receive a notification that the export is complete, hover the mouse pointer over **Exports** on the top tool bar. On the list of **Recently Exported Documents** that appears, click **Download** beside the name of the document.

3. Click **Open** to view the exported document or **Save** to save to your local PC.
4. Click **X** to close the pop-up box.

**To send a document by e-mail:**

1. Click the **E-mail** icon from the document tools.

   The **Checkpoint E-Mail Document** dialog box appears.

2. Enter one or more valid **To** addresses and, optionally, **Bcc** addresses.
3. Select the **Attachment Format** type from the drop-down list.
4. Optionally, enter a **Message**.
5. Include or exclude a **Disclaimer**.

   The default setting is to include the default disclaimer. To exclude, clear the **Include this disclaimer** check box.

   **Note**: Disclaimer text is stored the . You can create a disclaimer in the screen, or enter a new disclaimer in the **Checkpoint E-Mail Document** dialog box and, optionally, select the **Save as default** check box.

   **Note**: E-mail comes from Checkpoint's server, not the e-mail server at your company/firm.

6. Click **Send**.

**To save a document to Folders:**

**Note**: If you click the down arrow next to the **Save** icon, you can choose either **Save** or **Save**

**As**. A check mark next to one of the options in the drop-down list indicates which option was last used. If you click the **Save** icon directly, Checkpoint saves using the most recently used option.

1. Click the down arrow next to the **Save** icon to choose either the **Save** or **Save As** option.

   If you click **Save**, the document is saved to the current folder on the **Folders** screen and you are finished.

   If you click **Save As**, the **Save Document** window opens, where you can select another folder or create a new folder. Continue with Step 2.

2. On the **Save Document** window, click **Change Folder**.

3. When the **Change Folder** window opens, you can either select another folder from the list or click a link to create a new folder.

   If you want to select another folder, click the folder name and click **OK**.

   If you want to create a new folder, click **Create New Folder**. When the **Create Folder** window opens, enter the new folder name, select a location, and click **Create**. The new folder is added to the **Change Folder** window. Click the new folder name and click **OK**.

4. Optionally, on the **Save Document** window, you can enter a **Note** for the document. If you enter a note, the note is added to the top of the document.

5. On the **Save Document** window, click **Save** to add the document to the selected folder on the **Folders** screen.

### To open a document in a new window:

Click the **Open in New Window** icon in the document tools.

When you open the document in a new window, it stays open until you close it. This allows you continue with other activities in Checkpoint and return to the open document at any time. For example, you may select it later from the "Checkpoint | Open Document" button on the task bar at the bottom of the screen. If you are using dual monitors, you can drag the document to the other monitor and pull up something else on the main Checkpoint screen and look at both (for example, a code section and a regulation).

### To show/hide permalinks in a document:

1. Click the **Permalinks** icon in the document tools to show links.

2. Click the **Permalinks** icon again to hide links.

### To enter/exit reading mode (full screen):

1. Click the **Full Screen** icon in the document tools for a full screen view of the document.

2. Click the **Full Screen** icon again to return to normal view.

### To flag a document:

1. Click the **Flag** icon in the document tools.

Checkpoint adds the flagged document to the **Flagged Documents** screen.

2. To access flagged documents, click **Flagged** in the top toolbar.
3. To unflag a document, in the open document, click the **Flag** icon in the document tools again.

### To add a note to a document:

You can add one or more notes to a document, edit notes, and delete notes.

1. Click the **Note** icon in the document tools.
2. On the **Note** pop-up window, enter the note text and click **Save**.

   The note is added to the top of the document with a time/date stamp.
3. To add a new note, just click the **Note** icon again and repeat step 2.
4. To edit a note, click the **Edit** icon on the right side of the note. In the **Note** window, update the note and click **Save**.
5. To delete a note, click the **Delete** icon on the right side of the note. When the confirmation message appears, click **OK**.

**Note**: To hide the text of a note from the **Notes** pane at the top of a document, click the **Collapse Notes** icon in the right corner. Click the **Expand Notes** icon when you are ready to unhide the note text.

**Note**: You can also add notes to a document saved to a folder on the **Folders** screen.

### To refresh a topic view:

The **Refresh** icon appears only on Checkpoint Catalyst™ documents at the topic-level view (not subtopic). After exploring a topic by clicking "Show More" to expand the sub-topics, you can return the topic to its original form by clicking the **Refresh** icon. This closes the open sub-topics and returns them to their original condensed state.

# Viewing Checkpoint Catalyst™ Search Results

The general features and functions of the Search Result screen apply to all searches including the **Checkpoint Catalyst™** sources. Here are some features you will see in the **Checkpoint Catalyst** search results:

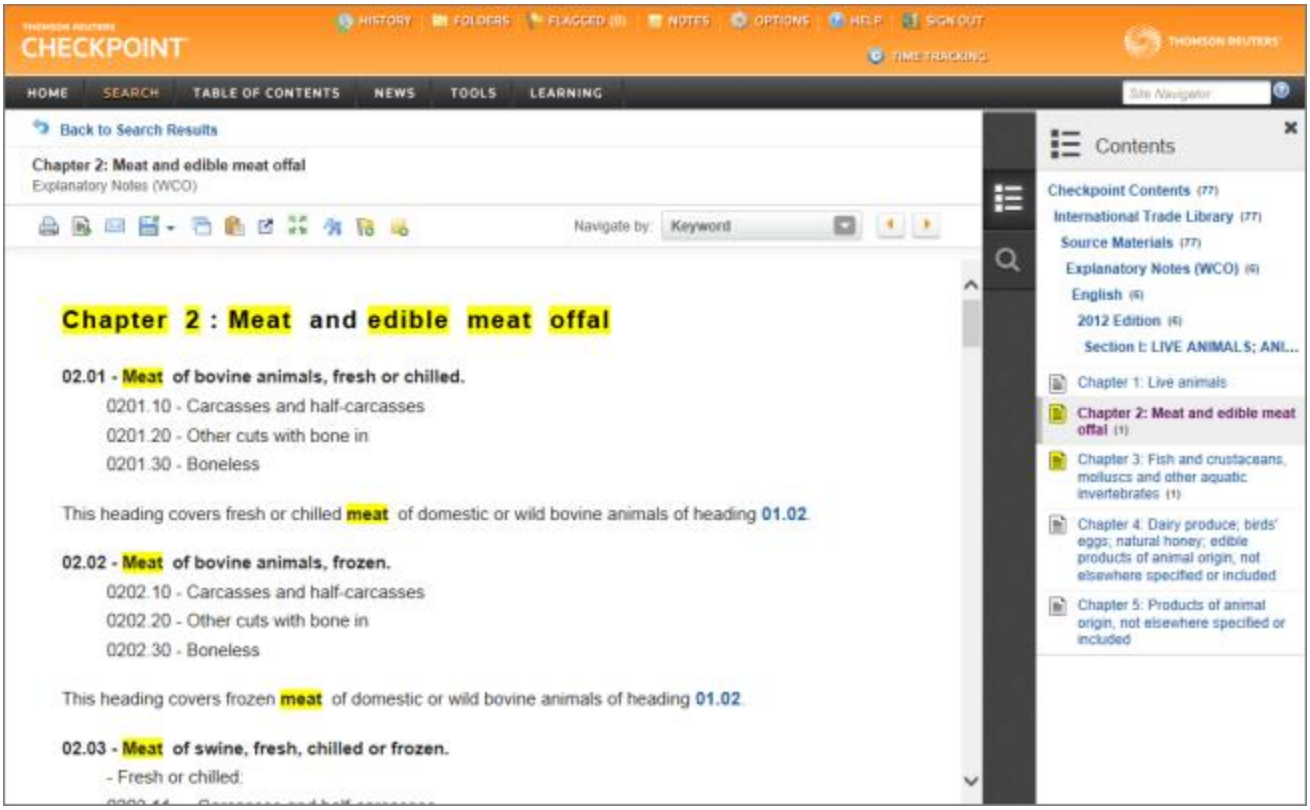
- If you perform a search of the Catalyst Library from the **Table of Contents** screen, Checkpoint displays in the results on the **Search Results** screen with the **Table of Contents** view as the default.
- If you click Display Levels 2 at the top of the results, Checkpoint expands to show all topics. If you click Display Level 3, Checkpoint expands to show all topics and their subtopics.
- You can click a topic title on the **Table of Content** to open the entire topic including all subtopics. When you open a full topic, all subtopics are collapsed and only the synopsis for each subtopic is displayed.
- After exploring at the full topic level and expanding the subtopics, if you would like to return the full topic to its original condensed form, click the Refresh icon in the document tools.
- When you open a subtopic document directly, there is a **Show Full Topic** link at the top that you can click to jump to the full topic level.
- On the **Source List** and **All Documents** views, you can only select subtopics and not the full topic.
- On the **Source List** view, click the plus icon next to the source title to display the three most relevant documents for your search. You can click the link at the bottom of the screen to display all documents in the search results.
- The **All Documents** view lists all documents in the search results sorted by relevance to your search criteria (starting with the most relevant, which is determined by an algorithm that analyzes each document). **Gold stars** next to each document title indicate the relative score for your search query (with five gold stars being the most relevant).
- On the **Table of Contents** view, if you click the total number of documents next to **Checkpoint Contents**, all documents in the search result are sorted and ranked by either **Relevance** or **Table of Contents** (depending on your **Sort by** setting), with gold stars indicating the relative score for your search query.
- Footnote content can be displayed in a pop-up window. When you click the number, a pop-up with the footnote text is displayed and any links are active in the footnotes.
- Many types of tools are supported within **Checkpoint Catalyst** content including calculators, checklists, create-a-charts, decision tools, document assembly, and iTables. The tools can be found by scrolling through the document or selecting a tool from the **Tools** tab in the Context Panel.
- If a user subscribes to **Checkpoint Catalyst™** but does not subscribe to the primary source materials reference within a Checkpoint Catalyst document, the document will be displayed in a preview window with limited functionality.

- If you choose to print, export, or email a **Checkpoint Catalyst** topic document, you will see a pop-up message that states that the topic may be large and asks you to confirm your choice to continue.
- For some documents, a **Catalyst** link appears in the top line links across the top of the document.

# Viewing International Trade Library Documents

The Harmonized Tariff Schedule of the United States (**HTSUS**) is published by the U.S. International Trade Commission. It contains all provisions enacted by Congress or proclaimed by the President and includes article descriptions, tariff rates, and special tariff programs.

Click to see an example of Checkpoint **Table of Contents** search results for an HTSUS chapter.


CHECKPOINT
HISTORY
FOLDERS
FLAGGED (0)
NOTES
OPTIONS
HELP
SIGN OUT
TIME TRACKING
HOME
SEARCH
TABLE OF CONTENTS
NEWS
TOOLS
LEARNING
Back to Search Results
Chapter 2: Meat and edible meat offal
Explanatory Notes (WCO)
Navigate by:
Keyword
Chapter 2 : Meat and edible meat offal
02.01 - Meat of bovine animals, fresh or chilled.
0201.10 - Carcasses and half-carcasses
0201.20 - Other cuts with bone in
0201.30 - Boneless
This heading covers fresh or chilled meat of domestic or wild bovine animals of heading 01.02.
02.02 - Meat of bovine animals, frozen.
0202.10 - Carcasses and half-carcasses
0202.20 - Other cuts with bone in
0202.30 - Boneless
This heading covers frozen meat of domestic or wild bovine animals of heading 01.02.
02.03 - Meat of swine, fresh, chilled or frozen.
- Fresh or chilled:
Contents
Checkpoint Contents (77)
International Trade Library (77)
Source Materials (77)
Explanatory Notes (WCO) (6)
English (6)
2012 Edition (6)
Section I: LIVE ANIMALS; ANI...
Chapter 1: Live animals
Chapter 2: Meat and edible meat offal (1)
Chapter 3: Fish and crustaceans, molluscs and other aquatic invertebrates (1)
Chapter 4: Dairy produce; birds' eggs; natural honey; edible products of animal origin, not elsewhere specified or included
Chapter 5: Products of animal origin, not elsewhere specified or included

# Viewing Citator History

Use the Citator Top Line Link to access the judicial history of a court case and trace the subsequent references and citing to the case.

RIA
COMM. v. FINK, ET AL., 60 AFTR 2d 87-5054 (107 S.Ct. 2729), Code Sec(s) 165, (S Ct), 0
American Federal Tax Reports (Prior Years) (RIA)
Track It
Annot
FTC
Citator
WG&L Treatises
COMM. v. FINK, ET AL., Cite as 60 AFTR 2d 87-5054 (107 S.Ct.
Sec(s) 165

**To access Citator history:**

1. At the top of a case or ruling, click the **Citator** top line link.
2. The **Links** tab in the **Context Panel** displays the judicial history of the current case.
3. Click a link in the history to display detailed information about the Citator entries for that case including the complete judicial history and record of cites. Each listed citation contains a link directly to the page where the subsequent case cited the original case.

Use the Citation Track It tool to be notified whenever a case or ruling references the case or ruling.

# Viewing Wildcard Search Results

When displaying results of a search in which you used wildcards, Checkpoint does not highlight all keyword variations as generated by the wildcard.

For example, a search for "terminate*" retrieves all documents that contain at least one occurrence of the word "terminate" or any variation of "terminate" (for example, "terminates" or "terminated"), but only highlights "terminate" when it exists as a complete word.

# Modifying a Search

There may be times when a keyword search returns a larger number of results than you had anticipated. Sifting through these results can be laborious, particularly if you are looking for a specific piece of information. Checkpoint makes it easy to change your search parameters:

- On the **Search Results** screen, you can change or add to the **Keywords** field at any time and then click **Search**.
- If you want to modify the sources you are searching, there are several ways to return to the search parameters screens. Depending on how deep you are in reviewing search results, click **Back to Search Results** and then **Back to Search** in the upper left of the screen to return to the search parameters screen.

**Example: Narrowing Search Results**

Suppose you are searching for information on IRA accounts in the Federal Editorial Materials sources. In your initial search, you may have typed "Individual Retirement Account" in the **Keywords** field. However, you find that this keywords string yields 4,874 documents, which is far too many to be manageable.

Given that your client is a widow, you can add the term "widow" to the **Keywords** field in the **Search Results** screen and click **Search**. That returns 157 results.

Add "early retirement" to the **Keywords** field and click **Search**. That returns a much more manageable 16 results.

# Back to Search

The **Search Results** screen contains a **Back to Search** link that returns you to the screen where you set up your search criteria.

When you open a document from the **Search Results**screen, the **Back to Search** link changes to **Back to Search Results**.

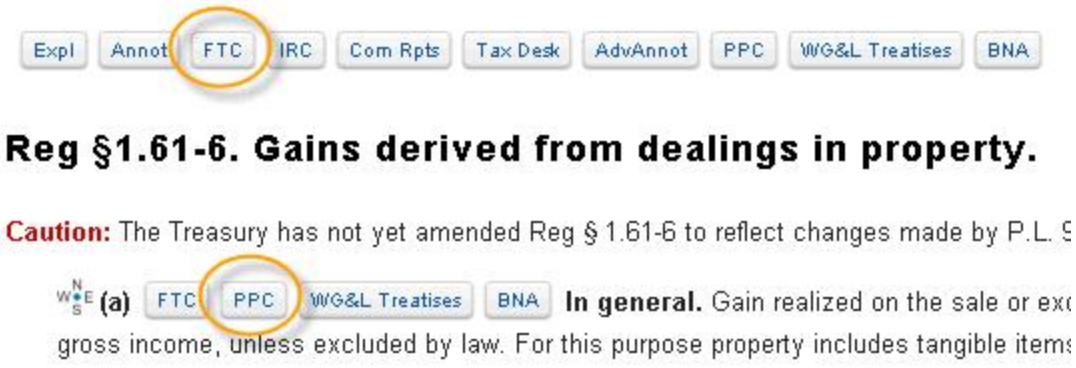
To move back through all the previously viewed search result screens within the current search, continuously click **Back to Search Results** till the required page is displayed.

When you drill deeper within a document to other references, click **Back to Search Results** on the top-left of the screen to go back to the previously viewed search result, and then click **Back to Search** to return to the screen where you initiated the search.

# Filtering Top Line and Side Line Links

**Top line** and **side line** links are buttons across the top of or embedded in some Checkpoint documents. You can click a button to display a list of related documents in the Context Panel on the right. Top line and side line links do not appear in all documents.

**Click here to see examples of top line and side line links in a document.**




You can filter top line and side line links within a document by keyword. This feature allows you to constrain a list of links by specific words that you want to locate.

**To filter top line and side line links:**

1. On the **Document** screen, click **Links** in the **Context Panel**.

   The **Links** tab opens

   > **Note**: The **Links** tab only appears in documents with top line and side line links.

2. Click **Filter Links**.
3. In the **Filter Links by Keyword** pop-up window, enter terms to define your search. You can also click the Thesaurus/Query Tool link for more advanced search features.
4. Click **OK**.

   The documents list is filtered by the keywords you entered.

5. To clear or modify the keyword filter, click **Clear Filter** or **Modify Filter**.

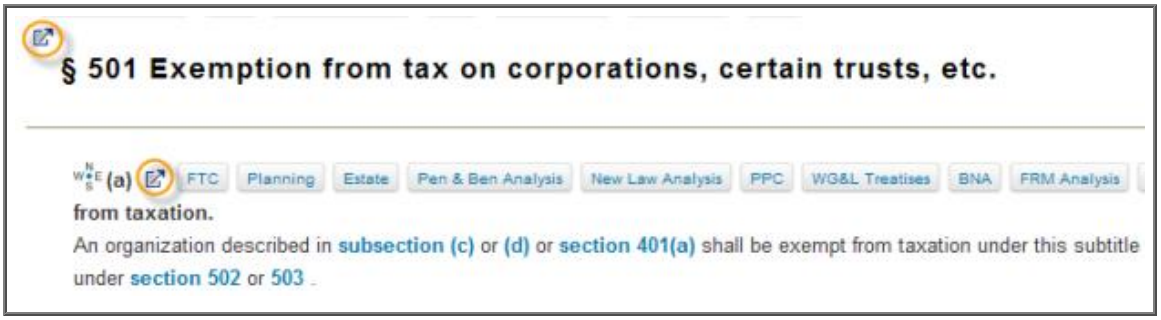
# Creating External Permalinks

The **permalink** feature allows you to generate a permanent link directly to a document or document section within Checkpoint. You can then save this link as a bookmark or shortcut that lets you return to the content. The **Show permalinks** icon is located in the document tools at the top of the **Document** screen.

**To create a permalink:**

1. Open the document to which you want to link.
2. On the document tools, click the **Show permalinks** icon.

   Any permalinks in the document are displayed.


§ 501 Exemption from tax on corporations, certain trusts, etc.
(a)
FTC
Planning
Estate
Pen & Ben Analysis
New Law Analysis
PPC
WG&L Treatises
BNA
FRM Analysis
from taxation.
An organization described in subsection (c) or (d) or section 401(a) shall be exempt from taxation under this subtitle under section 502 or 503 .

3. Select the permalink icon in the document and section you want to save.

   A **Permanent Document Link** window displays the permalink URL for you to save as a browser bookmark or shortcut to return to the document/section in the future.

   **Note**: Some documents contain multiple permalink icons, each displaying at a different section, allowing you to save a link directly to a section in the document.

4. Copy and paste the URL to a document or browser to save as a bookmark.
5. Click **Close** to close the window.

# Using Citation Tracker

Use the **Track It** feature within cases and rulings to be notified when another case or ruling references this document.

**Click here to see an example of a Track It top line link in a document.**

RIA
3K Investment Partners, et al., 133 TC 112, Code Sec(s) 6103; 6221; 6662, 09/3/2009
Tax Court & Board of Tax Appeals Reported Decisions (Prior Years) (RIA)
Navigate by:
Keyword
Track It
Citator
3K Investment Partners, et al. v. Commissioner, 133 TC 112, Code Sec(s) 6221; 6662.
3K INVESTMENT PARTNERS, 3K INVESTMENTS LLC, TAX MATTERS PARTNER, Petitioner v. COMMISSIONER OF INTERNAL REVENUE, Respondent.

**To activate Citation Tracker:**

1. At the top of a case or ruling, in the top line links, click the **Track It** link.

   The **Links** tab in the **Context Panel** opens.

2. Click **Turn On**.

   You will be notified by e-mail that **Tracker** has been activated for this document. When a new document references the tracked document, you will receive an e-mail notifying you and providing a link to the referencing document. You can also view tracked documents and their activity from the **Home** screen under the **Track It** content pane.

**To view a tracked citation:**

1. On the **Home** screen, click a link from the **Track It** pane to open the tracked document.
2. Select a link in the **Links** tab to open the referencing document.

   A new window displays the document that references the citation being tracked.

**To turn off Tracker:**

1. Open the tracked document and click **Turn Off** in the **Links** tab.
2. When the **Confirm** pop-up window appears, click **OK**.

# Using Compare It Links

**Compare It** is a unique feature of Checkpoint that allows you to identify connections between documents, code, and explanations in different jurisdictions. For example, a U.S. Tax Reporter (USTR) document may have specific explanations at a state and local level. Or, if you're in an explanation paragraph in one state, you can easily get to an explanation of that same issue in another state. **Compare It** links allow you to quickly view the related explanations, providing a powerful research tool.

RIA
EXP ¶4074 Qualified plan coverage of U.S. citizens of certain U.S. subsidiaries in business abroad.
Explanations (Code Arranged - USTR) (RIA)
Navigate by:
Keyword
Annot
IRC
Regs
Com Rpts
Hist
Compare It
EXP ¶4074 Qualified plan coverage of U.S. citizens of certain U.S. subsidiaries in business abroad.
Employees of a U.S. subsidiary in business abroad may be covered by the qualified plan of the parent
corporation. The plan must expressly provide for coverage of subsidiary employees who are U.S. citize
and who aren't covered by any other plan with respect to the compensation received from the subsidia

**To use Compare It:**

1. Click the **Compare It** top line link.

   The **Links** tab in the **Context Panel** shows a list of associated documents.

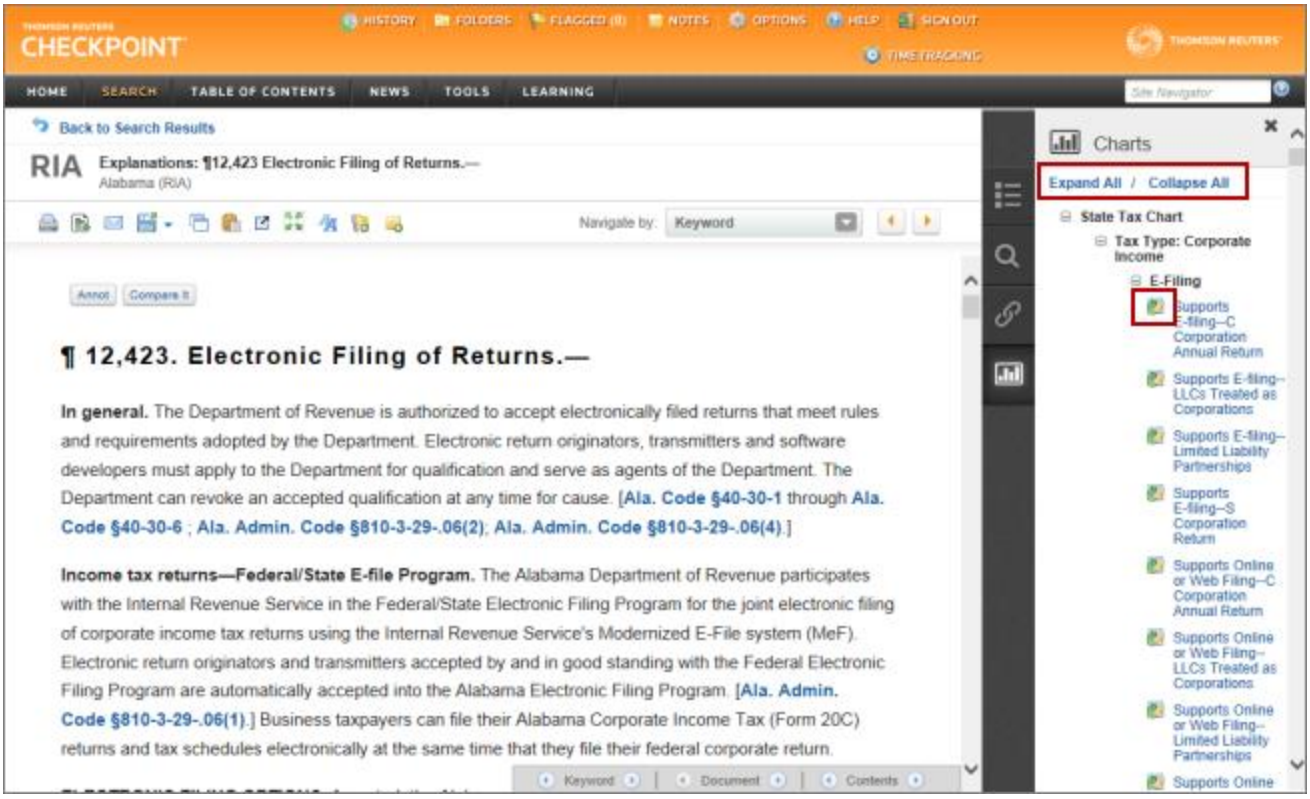
2. Click a document title to view its contents.

   The document opens in a new window.

# Using State and Local Charts Tab

Use the **Charts** tab when viewing a State and Local document to quickly create a chart using the State and Local create-a-chart feature. This tab is available for documents that contain chart data.

The **Expand All / Collapse All** option for this tab structures your documents to expand or collapse them as needed. The default is the expanded view. Also notice that an icon has been added to go to the chart.


CHECKPOINT
HOME
SEARCH
TABLE OF CONTENTS
NEWS
TOOLS
LEARNING
Back to Search Results
RIA
Explanations: ¶12,423 Electronic Filing of Returns.—
Alabama (RIA)
Navigate by:
Keyword
¶ 12,423. Electronic Filing of Returns.—
In general. The Department of Revenue is authorized to accept electronically filed returns that meet rules and requirements adopted by the Department. Electronic return originators, transmitters and software developers must apply to the Department for qualification and serve as agents of the Department. The Department can revoke an accepted qualification at any time for cause. [Ala. Code §40-30-1 through Ala. Code §40-30-6 ; Ala. Admin. Code §810-3-29-.06(2); Ala. Admin. Code §810-3-29-.06(4).]
Income tax returns—Federal/State E-file Program. The Alabama Department of Revenue participates with the Internal Revenue Service in the Federal/State Electronic Filing Program for the joint electronic filing of corporate income tax returns using the Internal Revenue Service's Modernized E-File system (MeF). Electronic return originators and transmitters accepted by and in good standing with the Federal Electronic Filing Program are automatically accepted into the Alabama Electronic Filing Program. [Ala. Admin. Code §810-3-29-.06(1).] Business taxpayers can file their Alabama Corporate Income Tax (Form 20C) returns and tax schedules electronically at the same time that they file their federal corporate return.
Charts
Expand All / Collapse All
State Tax Chart
Tax Type: Corporate Income
E-Filing

**To create a chart using the Charts tab:**

1. Click the chart type from the **Context Panel** on the right.

   You are directed to the State and Local create-a-chart feature.

2. Select the chart type and click **Next**.
3. Select the state or states you want to search.
4. Click the **Create the Chart** button.

   The chart results are displayed.

# About the Table of Contents

You can access the **Table of Contents** screen by clicking the **Table of Contents** menu on the menu bar from any screen in Checkpoint.

**Note**: You can also click the Table of Contents view on the **Search Results** screen to see your search results in a Table of Contents hierarchy.

On the **Table of Contents** screen, **Browse** is the default view, but you can also access titles or search templates under **Jump To**.

The **Browse** view displays the Checkpoint Contents where you can you browse through contents in the same way you would scan the headings in a book's table of contents. The Checkpoint Contents contains research materials sorted into expandable and collapsible folders of related information. By expanding folders and their subfolders, you can select specific entries to search for the documents that are most relevant to your needs. You can also use the Display Level feature to expand all sources in those levels.

The screen displays a Keywords field where you can enter words or phrases to add to your search criteria.

You can also print multiple documents from the Table of Contents.

**Note**: You can change document settings to display the Table of Contents view as the default for all document searches in Checkpoint. To do so, click **Options** in the toolbar, click **Search/Display**, and under **Search Results Default View**, click **Table of Contents**.

# Understanding the Table of Contents Screen

To access the **Table of Contents** screen, click the **Table of Contents** menu from any screen in Checkpoint.

**Note**: You can also select the **Table of Contents** view on the **Search Results** screen.

The **Table of Contents** screen provides an outline view of categorized information. You get a bird's eye view of all available information in a category arranged in a hierarchal structure of levels and sublevels. The screen in Browse view has three main areas: Keyword Search, Checkpoint Contents, and the left navigation bar.

| | |
|---|---|
| **Keyword Search** | You can enter search keywords in the **Keyword** field at the top of the screen just as you do with Checkpoint's main Search feature. The only difference is that you are searching specific areas of the Table of Contents. You can perform either an Intuitive Search or Terms & Connectors search.You can also use the Thesaurus/Query Tool for advanced search functions. |
| **Checkpoint Contents** | The Checkpoint Contents section displays folders, subfolders, and documents arranged in a hierarchy of levels. The first-level folders are displayed by default when you access the **Table of Contents** screen. You can select Level 2 and Level 3 to expand the hierarchy and display all of the sources in those levels.<br><br>As you search the Table of Contents, the Checkpoint Contents area displays a running header that shows your relative location in the Table of Contents structured view. The highest level heading is listed first, followed by subheadings. |
| **Left navigation bar** | In the left navigation bar, the default view is **Browse**. Under the Jump To feature you can access specific information, such as titles of Checkpoint sources and templates that let you search publication collections. To return to the Checkpoint Contents, click **Browse**. |

# Expanding the Table of Contents

The Table of Contents contains folders, subfolders, and documents arranged in a hierarchy of levels. The Level 1 folders are displayed by default when you access the **Table of Contents** screen. You can view the other levels in either of two ways:

- Click the **folder name**. Checkpoint expands the folder to show the next level of its subfolders, but no longer displays the other first-level folders.
- Click the **+ symbol** next to a folder. Checkpoint expands the folder to show the next level of its subfolders and also continues to display the other first-level folders.

You continue this process of expanding or clicking until you find the reference material you want. The following procedure demonstrates expanding a folder, using the Federal Library folder as an example.

**To expand a Table of Content folder to access a document:**

1. On the menu bar, click the **Table of Contents** menu.

   Checkpoint's Table of Contents appears with first-level folders as the default view.

2. Click the **Federal Library** heading link (not the + symbol).

   The Table of Contents changes to display only the entries below Federal Library.

3. Click the **Federal Source Materials** link.
4. Click the **IRS Publications** link.
5. Click the **Pubs Circ-No-230 - 519** link.
6. Click the **Publication 1 - SEPTEMBER 2012 Your Rights as a Taxpayer** link.

   This folder shows several documents. Documents are indicated by a document icon and print icon.

7. Click the document title to view the document's text on the **Document** screen.

   You can click the **Contents** tab in the Context Panel on the right to see the location of the document within the Table of Contents.

**Note**: If you move too deeply into the Table of Contents, you may eliminate relevant material from your view. To move back to higher levels, click an earlier link in the **Contents** tab. For example, clicking **Checkpoint Contents** takes you back to the top level of the Table of Contents.

**Explanations in GAAP Reporter:** On the **Document** screen, in the **Navigate by** drop-down list, you will see **Explanations** when viewing an Explanation document. (Explanations is not available if you are viewing a document in the GAAP Reporter database. This appears only for an Explanation document.) Explanation documents can be identified by 'EXP' in the title and 'EX<Numeric Value>' in the citation.

# Understanding Table of Contents Symbols

At the top level, the Table of Contents screen displays all sources available in your Checkpoint subscription. Each level on the Table of Contents has two components: a graphic symbol and a descriptive hypertext link. When you view documents in the **Table of Contents** view of the **Search Results** screen, additional graphics indicate specific meanings.

The graphic symbols are described in the following table.

| Symbol | Meaning | Description |
|---|---|---|
| | Closed level symbol | Indicates that there are entries below the current level. Click the + to display these subordinate entries. Indented sublevel entries may also have a + or - symbol next to them. You can continue clicking the + symbol to open levels in this manner all the way to the final lone document level. |
| | Open level symbol | Indicates that you have fully expanded the current Table of Contents entry, so that all the documents it contains are visible. Click the minus symbol to collapse these levels. |
| | Open a Table of Content Location | Click this icon to open a specific Table of Contents location. You see this symbol in FASB information to indicate an intersecting topic. |
| | Lone document symbol | Click the document title to view its complete text. |
| | Document with Hits | If you have performed a search, and elected to view your search results in the Table of Contents view, documents containing your keywords are marked with a yellow document symbol. |
| | Document with subentries collapsed | Click these icons to expand the contents of the document and view its subentries. Each subentry is marked with a separate document icon. Subentries are not separate documents. When you click the subsection title to access its text, you are in fact linking to the relevant point within the parent document. If clicking the icon for the subentry does not work, the subentry icon is not a live icon. |
| | Document with subentries expanded | All subentries belonging to the current document have been revealed. Click the subentry title to view its text. You are taken to the relevant point within the parent document. |
| | Subentry of fully expanded document | Click any subentry's title to view its text. You are taken to the relevant point within the parent document. |
| | Print this Document | Click this icon to print the document from the Table of Contents. |

| Symbol | Meaning | Description |
|---|---|---|
| | Action Menu | Hover over any content in the Table of Contents to view this icon. Use the menu to create a permanent link, print, export, or email specific content in the Table of Contents. This icon is found next to folders, subfolders and some individual document content. |
| | Relevance | Gold stars next to each document title indicate the relative score for your search query, with five gold stars being the most relevant. |
| | Notes & highlights | A note icon to the right of a document in the **Table of Contents** view on the **Search Results** scren indicates there are one or more notes or highlights in the document. You can click the icon to view a pop-up window containing the notes and highlights. |

# Searching with the Table of Contents

As an alternative to searching through Checkpoint contents using the main feature, you may want to search for information in specific areas of the Table of Contents. While the Table of Contents searching is independent of Checkpoint's main Search feature, the procedures are similar and they both have access to all of Checkpoint's resources.

**To perform a search in the Table of Contents:**

1. On the menu bar, click the **Table of Contents** menu.

   The **Table of Contents** screen appears with Browse as the default view.

2. the Checkpoint Contents as necessary until you locate the folders you want to search.
3. Select the check boxes next to the folders you want to search, up to a maximum of 15.

   **Note**: By selecting a Table of Contents folder check box, you automatically include all of its subfolders, so you do not need to check them separately. For a more focused search, drill down and select lower level folders.

4. Enter your search keywords in the **Keywords** field. You can also click for advanced search functions:
   - A previous keywords list lets you choose one of the last 10 keywords you have used.
   - Special is available to help you refine your search. Choose a search connector from the **Connectors** list.
   - You can generate a list of your search terms' synonyms that appear in the sources you are searching. To include all synonyms, click the **Include all alternatives in query** link.

5. Click **Search** to start your search.

   Your search results appear on the **Search Results** screen with the **Table of Contents** view the default. You can also select to view the results in the All Documents or Source List views.

**Note**: You can limit your search results to display only those sources or documents that contain your keywords by selecting **View hits only** icon in the upper right of the screen.

**To show words around hits**

On the **Table of Contents** view, you can select the **Show words around hits** icon in the upper right of the screen to display twenty-five worlds that surround the search's keywords. You can also select to **Hide words around hits**.

# Using the My Titles Feature

The My Titles feature in the **Tables of Contents** screen lets you create and save a list of your most commonly used sources for easy recall and review.

### To use the Titles feature:

1. On the menu bar, click the **Table of Contents** menu.
2. In the left navigation bar, click **Titles** under the **Jump To** heading.

   A list of titles for Checkpoint's sources appears.
3. Click a title that you want to jump to.

   Checkpoint returns to the Checkpoint Contents view and displays the expanded running header showing the relative location of the title you selected. If the title is a document, you can click to open it. If the title is a source, you can search within it.

### To create a custom My Titles list:

1. On the menu bar, click the **Table of Contents** menu.
2. In the left navigation bar, click **Titles** under the **Jump To** heading.
3. Click the **Create My Titles** link.
4. Select the check boxes for the sources you want to include in your custom titles list.

   **Note**: You can quickly jump to an alphabetical section of the source list by clicking the letter hyperlinks.
5. Click **Save** to save your My Titles list.

Now, when you click **Titles** in the left navigation bar, your customized My Titles list displays automatically.

### To edit or delete your custom My Titles list:

- Edit your My Titles list by clicking the **Change** link.
- Delete your My Titles list by clicking the **Delete** link.

# Using the Jump To Feature

The Jump To feature in the **Tables of Contents** screen provides quick access to titles in the Table of Contents and templates for searching tax code, tax schedules, and publication collections. is already covered in another topic, so this topic discusses the templates under **Jump To**.

**To use the Jump To feature:**

1. On the menu bar, click the **Table of Contents** menu.

   The **Table of Contents** screen appears.

2. In the left navigation bar, under the **Jump To** heading, select the template you want to jump to.

3. When the corresponding template opens, complete the relevant fields with the appropriate search criteria, and then click the button to start the search (for each template, the button is different).

   Checkpoint returns to the Checkpoint Contents view and displays the search results that meet your search criteria.

# Using the Indexes

Checkpoint Indexes provide a quick method to browse for a specific topic within a set of content. Indexes are available from the **Search** menu in all of the practice areas and the results are displayed in the **Table of Contents** hierarchy.

**To access a practice area index:**

1. On the menu bar, click the **Search** menu.
2. In the **Practice Area** drop-down list, select any practice area.

   Checkpoint displays the practice area's source sets.
3. In the left navigation bar, under the **Go To** heading, click either **Indexes** or **State Indexes** (for State & Local).
   - If you select **Indexes**, the index result appears in the Checkpoint Contents section of the **Table of Contents** screen.
   - If you select **State Indexes**, the **Select a State** screen appears. Click the state whose index you want to access. The index result appears in the Checkpoint Contents section of the **Table of Contents** screen.
4. Browse the index by expanding the folders to drill down to the listings you want to view.

**To access the index for a state and local tax reporter:**

1. On the menu bar, click the **Search** menu.
2. In the **Practice Area** drop-down list, select **State & Local**.

   Checkpoint displays the practice area's state source sets.
3. Hover your mouse pointer over a state name.
4. When the book icon appears, click the icon.

   The state reporter index for the state you selected appears in the Checkpoint Contents section of the **Table of Contents** screen in a pop-up window
5. Browse the index by expanding the folders to drill down to the listings you want to view.

# Using the Table of Contents Action Menu

The **Action Menu** is a Checkpoint feature that lets you create a permanent link, print export and email specific content in the Table of Contents. You can then save the permalinks in a document or as a desktop shortcut for future reference.

The **Action Menu** icon is found next to folders and subfolders, and some documents in the Table of Contents.

**To create a Table of Contents permalink:**

1. On the menu bar, click the **Table of Contents** menu.
2. Hover over a Table of Contents title to view the **Action Menu** icon.
   Click this icon to use the **permalink**

option to bookmark any required folder.
3. In the **Permanent Table of Contents Link** pop-up window, copy the URL from the field.
4. Click the **X** in the upper right corner to close the pop-up window.
5. You can then paste the URL in a document, in an e-mail message, or as a desktop shortcut to return directly to this Table of Contents location in the future.

**To save a copied permalink URL as a desktop shortcut:**

1. Hover over a Table of Contents title to view the **Action Menu** icon.
   Click this icon to use the **permalink** option to bookmark any required folder.
2. Copy the **URL** from the **Permanent Table of Contents Link** pop-up window.
3. Right-click anywhere on your computer's desktop.
4. Click **New**, and then click **Shortcut**.

   The **Create Shortcut** dialog box appears.
5. Right-click in the blank field and paste the copied URL.
6. Click **Next**, type a shortcut name, and then click **Finish**.

   The shortcut icon appears on the desktop.

**To Print, Export and Email specific content using the Action Menu Icon:**

1. Hover over a Table of Contents title to view the **Action Menu** icon.
2. Click the icon to view the available **Print**, **Export**, **Email** and **Permalink** options.
3. These actions allow you to print, export, email or create a permalink for a specific document.

**Note**: **Print**, **Export**, and **Email** are only available from the Action menu in specific Checkpoint content.

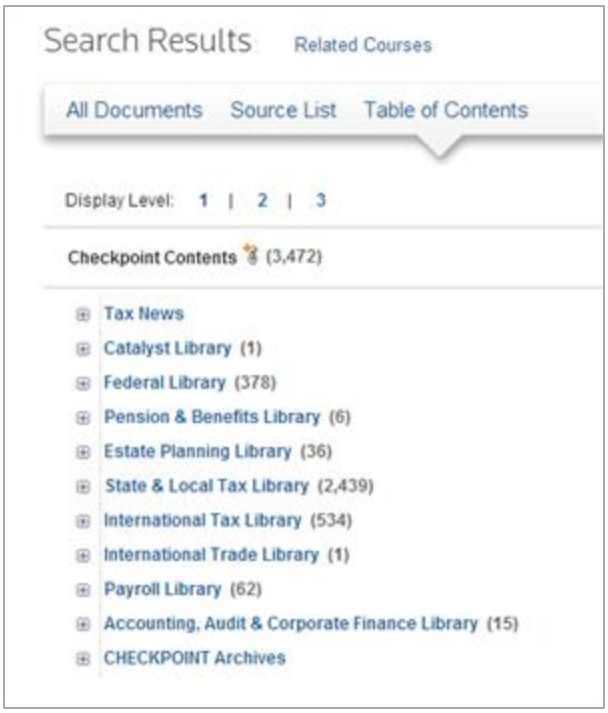
# Using the Table of Contents Navigation Tools

Several tools are available to help you navigate your search results within the Table of Contents format.

| | |
|---|---|
| | When you perform a search, each source in the Table of Contents list with hits shows the number of hits in parentheses following the source name. You can click the + symbol or the source name to expand the folders to view the search results detail.<br><br>You can also click the number of hits directly to view a list of all documents without having to open any subfolders.<br><br>If you click the total number of documents next to the Checkpoint Contents, or the number of documents next to any of the sources, the documents are sorted and ranked by either **Relevance** or **Table of Contents** (depending on your **Sort by** setting) to your search criteria. Gold stars next to each document title indicate the relative score for your search query (with five gold stars being the most relevant). |
| | Select this icon from the document tools if you want the Table of Contents search results to display only the sources that have hits. |
| | Select this icon from the document tools if you want to show the 25 words that surround the keywords on the Table of Contents view on the Search Results screen. |
| | The **Action Menu** is found next to folders and sub folders. The Action Menu is a Checkpoint feature that lets you create a permanent link, print, export and email content in the Table of Contents. |
| | Click the display number (1, 2, or 3) to view the level of source folders:<br>• Level 1 view displays the top level of folders.<br>• Level 2 view expands the folders to display the first and second level of folders.<br>• Level 3 view expands the folders to display the first, second, and third level of folders. |

# Viewing a Flattened List of Hits in the Table of Contents

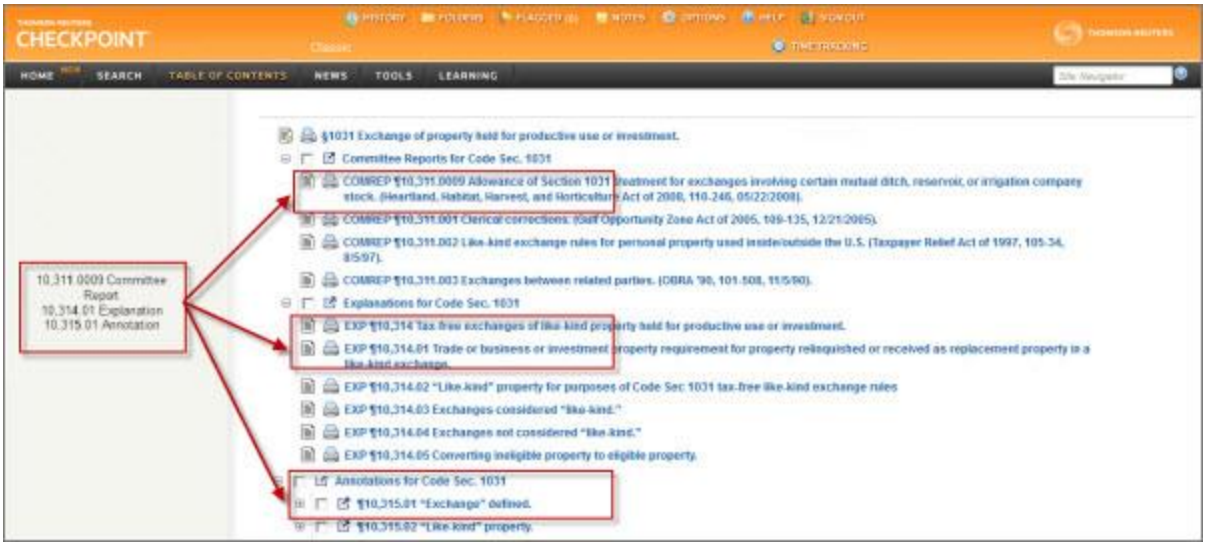
When viewing a search result in the **Table of Contents** view, you can view all documents from any TOC level without drilling down into each item. For example, in the following graphic, you could click the circled number **37** and see a list of all 37 documents, without having to open each of the subfolders.



# Understanding United States Tax Reporter Smart Paragraph Numbering

### Code Sequenced Paragraphing (Smart Paragraph Numbering)

The paragraph number and the Code section number are identical, with an additional digit on the paragraph number to identify the type of material. The first numerals of each paragraph number correspond to the Code section at issue such as 1031. The final numeral before the decimal point specifies the type of information covered in the paragraph. The numeral 5 would specify issue 10315.01 5 as an Annotation.




### Code Sequenced/Smart Paragraph Numbering Key

**Smart Paragraphing Web**

You can tell **which code section** your results cover
You can tell **what type of information** to which you are referred

Committee reports = 1
Explanations = 4
Annotations = 5
Prior Law Material = 8

***Examples***
Paragraph 10,311 = Committee reports for code section 1031
Paragraph 10,314 = Explanations for code section 1031
Paragraph 10,315 = Annotations for code section 1031
Paragraph 10,318 = Prior Law Material

**Smart Paragraph Numbering Print**

You can tell **which code section** your results cover
you can tell **what type of information** to which you are referred

Code language = 0
Committee reports = 1
Final, Temporary Regulations and Proposed Amendments = 2
Proposed Regulations = 3
Explanations = 4
Annotations = 5
Miscellaneous material not directly related to a Code Section = 6 or 7
Prior Law Material = 8
Overview of Paragraphs for related issues = 9

***Examples***
Paragraph 10,310 = Code Section 1031
Paragraph 10,311 = Committee reports for code section 1031
Paragraph 10,312 = Final, Temporary and Proposed Regulations for section 1031
Paragraph 10,313 = Proposed Regulations for section 1031
Paragraph 10,314 = Explanations for code section 1031
Paragraph 10,315 = Annotations for code section 1031
Paragraph 10,316 = Misc material not directly related to Code Section 1031
Paragraph 10,318 = Prior Law Material

# Printing, Exporting, or E-mailing a Single Document

You can open documents from the Search Results screen, Table of Contents screen, or Folders screen.

When you open a document, Checkpoint displays the document in the **Document** screen. The **Document** screen shows the complete text of a document along with tools to navigate the document, open related documents, navigate search results, export, and save.

You can print or export a document or send a document in an e-mail using the document tools at the top of the **Document** screen.

**Note**: You can hover your mouse pointer over the document tools icons to view labels.

### To print a document:

1. Open the document you want to print.
2. Click the **Print** icon from the document tools at the top of the screen.

   The document appears in a pop-up window with a source and document citation. The browser **Print** dialog box also opens.
3. On the **Print** dialog box, click **Print**.

### To export a document:

1. Open the document you want to export.
2. Click the **Export** icon from the document tools.

   The **Checkpoint Export** dialog box appears.
3. Select the export format. (MS Word is the default)

   **Note**: The default export format for documents is defined in your Checkpoint General Settings options.
4. Select whether you want to show links in the exported document by clicking **Yes** or **No**.
5. Click **Continue** to proceed with the download.

   If you selected the MS Word or RTF format, the **File Download** dialog box appears.
6. Click **Open** to open the document or **Save** to save the document to your local computer.
7. Close the dialog box.

**Note**: If you select the HTML or PDF export format, the document text is shown in a preview window, and you use the browser **File** menu to save the file. Regardless of the format, a source citation is exported with the text.

### To send a document in an e-mail:

1. Open the document you want to send in an e-mail.
2. Click the **E-mail** icon from the document tools.

   The Checkpoint E-mail Document template opens with your address in the **Bcc** field.

   **Note**: Because Checkpoint is sending the e-mail, the **From** field says Checkpoint. The **Subject** field shows your e-mail address, so the recipient can see who sent the message.

3. In the **Attachment Format** drop-down list, select the format for the document.
4. In the **To** field, enter the e-mail address of the recipient.
5. In the **Message** field, enter any message you want to add for the recipient.

   **Note**: The **Disclaimer** field displays the default disclaimer message that was set up in the Print/Export/E-mail options. You can edit the disclaimer message before sending.

6. Select the **Include this disclaimer** check box to have the disclaimer sent with the e-mail. Clear the check box if you do not want to include the disclaimer.
7. Select the **Save as default** check box if you want to save the disclaimer text as your default disclaimer for all document and selected text e-mails.
8. Click **Send**.

   A confirmation message states that you have successfully sent the document.

9. Click **Close** to close the message.

# Printing and Exporting Multiple Documents

You can print and export documents from all three views on the Search Results screen. In each view, you can expand the sources to see a list of the documents that match your search criteria along with navigation tools. You can print and export multiple documents using the document tools at the top of the screen.

### To print multiple documents:

1. Expand the **Search Results** until you see a list of all documents in the source.
2. Select the check boxes next to each of the documents you want to print.
3. Click the **Print** icon from the document tools at the top of the screen.

   The text of the selected documents appears in the Document Display pop-up window along with a source and document citation. The browser's **Print** dialog box also opens.
4. On the **Print** dialog box, click **Print**.

### To export multiple documents:

1. Expand the **Search Results** until you see a list of all documents in the source.
2. Select the check boxes next to the documents you want to export.
3. Click the **Export** icon from the document tools at the top of the screen.

   The **Checkpoint Export** dialog box appears.
4. Select the export format. (MS Word is the default)

   **Note**: The default export format for documents is defined in your Checkpoint General Settings options.
5. Select whether you want to export the documents in a single .zip file.

   **Note**: Zipping the files is recommended as it speeds the export process. The individual documents can be extracted from the .zip file after the export has completed.
6. Select whether you want to show links in the exported document by clicking **Yes** or **No**.
7. Click **Continue** to proceed with the download.

   If you selected the MS Word or RTF format, the **File Download** dialog box appears.
8. You can click **Open** to open the document or **Save** to save the document to your local computer.
9. Close the dialog box.

**Note**: If you select the HTML or PDF export format, the document text is shown in a preview window, and you use the browser **File** menu to save the file. Regardless of the format, a source citation is exported with the text.

# Printing, Copying, or E-mailing Selected Document Text

You can open documents from the Search Results screen, Table of Contents screen, or Folders screen.

When you open a document, Checkpoint displays the document in the Document screen. The **Document** screen displays the complete text of a document along with tools to navigate the document, open related documents, navigate search results, export, and save.

You can select document text to print, copy, or send in an e-mail using the document tools icons at the top of the **Document** screen.

**Note**: You can hover your mouse pointer over the document tools icons to view labels.

### To print selected text:

1. Select the text you want to print from the **Document** screen.

   The **Selected Text Option** drop-down list from the document tools automatically opens.

2. Click **Print Selected Text** from the drop-down menu.

   The selected text appears in a separate window with a source and document citation. The browser's **Print** dialog box also opens.

3. On the browser's **Print** dialog box, click **Print**.

### To copy selected text:

1. Select the text you want to copy from the **Document** screen.

   The **Selected Text Option** drop-down list from the document tools automatically opens.

2. Click **Copy Selected Text** from the drop-down menu.

   The selected text appears in a separate window with a source and document citation. A message states that the text is copied to the Microsoft Windows clipboard.

3. Click **OK** to close the window.

4. Paste the text in the desired location.

### To send selected text in an e-mail:

1. Select the text you want to send in an e-mail from the **Document** screen.

   The **Selected Text Option** drop-down list from the document tools automatically opens.

2. Click **E-mail Selected Text** from the drop-down menu.

   The selected text appears in the Checkpoint E-mail Selected Text template. Your Checkpoint e-mail address automatically appears in the **Bcc** field.

**Note**: Because Checkpoint is sending the e-mail, the **From** field says Checkpoint. The **Subject** field shows your e-mail address, so the recipient can see who sent the message.

3. In the **To** field, enter the e-mail address of the recipient.
4. In the **Message** field, enter any message you want to add for the recipient.

**Note**: The **Disclaimer** field displays the default disclaimer message that was set up in the Print/Export/E-mail options. You can edit the disclaimer message before sending.

5. Select the **Include this disclaimer** check box if you want the disclaimer sent with the e-mail. Clear the check box if you do not want to include the disclaimer.
6. Select the **Save as default** check box if you want to save the disclaimer text as your default disclaimer for all document and selected text e-mails.
7. Click **Send**.

   A confirmation message states that you have successfully sent the text.
8. Click **Close** to close the message.

# Printing Multiple Documents from the Table of Contents

Checkpoint provides a useful feature for printing multiple documents from within the Table of Contents.

**To print multiple documents from the Table of Contents:**

1. In the menu bar, click the **Table of Contents** menu.
2. On the **Table of Contents** screen, expand the folders and subfolders to locate the documents you want to print.

   **Note**: A printable document has a **Print** icon next to it.

3. For multiple documents, hold down the **Ctrl** key and at the same time click the **Print** icon next to each of the documents you want to print.

   The documents you select are added to the **Print Multiple Documents** dialog box. Depending on the number of documents you select, the window may take a few seconds to appear.

4. On the **Print Multiple Documents** dialog box, click **Print**.

# Printing Saved Documents from Document Folders

Checkpoint makes it easy to print documents you have saved in a personal document folder. Use the **Folders** link on the top toolbar to access your stored documents.

**To print documents you have saved in a document folder:**

1. On the top toolbar, click **Folders**.

   The **Folders** screen appears.

2. Expand the folder containing the documents you want to print.

3. Select the documents by clicking the applicable check boxes.

4. Click the **Print** icon from the document tools at the top of the screen.

   The browser opens a **Document Display** window with a preview of the documents you selected for printing. The browser also opens the **Print** dialog box.

5. On the browser **Print** dialog box, click **Print**.

# Exporting Saved Documents from Document Folders

Checkpoint makes it easy to export documents that you have saved in a personal document folder.

**To export documents from a personal document folder:**

1. On the top toolbar, click **Folders**.

   The **Folders** screen appears.

2. On the left navigation bar, click the folder containing the documents you want to export.

   The documents stored in the folder appear on the right.

3. Select the check boxes next to the documents you want to export.

4. From the document tools at the top of the screen, click the **Export** icon.

   **Note**: You can hover your mouse pointer over the document tools icons to view labels.

5. Follow the browser's on-screen instructions for saving the documents to an external location.

# Copying and Pasting Text to Other Applications

One easy way to save a document is to copy the document's text and paste it into another application. When you select and copy text, Microsoft Windows stores it in its clipboard feature. The clipboard holds the text until you paste it into another application, or until you replace it with another piece of copied information.

You can open documents from the Search Results screen, Table of Contents screen, or Folders screen.

**To copy text to another application:**

1. Open the document that has the text you want to copy.
2. Select the text you want to copy.

   The **Selected Text Option** drop-down list from the document tools automatically opens.
3. Click **Copy Selected Text**.

   The selected text appears in a separate window with a source and document citation. A message states that the text is copied to the Microsoft Windows clipboard.
4. Open the other application (such as a word processing program).
5. When the target application opens, position your cursor where you want to insert the copied text.
6. Use the application's paste feature to paste the copied text (such as **Edit > Paste**).

   The text appears in the target application.

# Understanding Folders

Checkpoint provides a **Folders** screen for storing searches and documents. You can create and organize your own folders for categorizing searches and documents that you save. You can create up to 250 folders in which you can save a maximum of 1000 searches and documents. Once you have saved a search to a folder, it can be run again at any time.

**Note**: Hovering your mouse pointer over **Folders** in the top toolbar displays a menu that shows the name and contents of the current folder on the **Folders** screen. You can click any of the document links to open a document or search. If you click the **View All Folders** link at the bottom of the menu, you are taken directly to the **Folders** screen.

### To view saved searches or documents:

1. On the top toolbar, click **Folders**.

   The **Folders** screen appears.

2. On the left navigation bar, select the folder where the search or document is stored.

3. Select options from the **Type**, **Name/Keywords**, **Information**, **Note**, and **Saved/Scheduling** columns, as needed. See table that follows.

| COLUMN | DESCRIPTION |
|---|---|
| **Type** | Contains either a magnifying glass icon that runs the search or a document icon that opens the document.<br><br>**Note**: If the document icon contains a yellow triangle warning symbol, then the document has changed or been recategorized. |
| **Name/Keywords** | Shows the name you assigned to the search at the time you saved it on the **Save Search** screen.<br>The check box in front of the search name allows you to move or delete that search. Clicking the search name link takes you to the **Search Results** screen. |
| **Information** | Identifies the sources you selected for the original search. Click **more...** to see **Search Terms** and a list of related sources. |
| **Note** | A note icon lets you enter user notes for this search or document. When a note has not been entered , the icon appears gray. When a note has been entered, the icon changes to yellow. You can hover over the icon to see the text. Click the icon to open a dialog box and add or edit text. A note can be up to 200 characters. |
| **Saved/Scheduling** | Shows the date and time when the search or document was saved. For searches, click the calendar icon to view or change the schedule when the search is to run. |

### To print, export, move, or delete searches or documents:

Additional document tools icons are available at the top of the search/document list.

- Select **Print** to view and print a selected document in a printer friendly format.
- Select **Export** to save a stored document to another location, such as your desktop or local hard drive.
- Select **Move** to transfer a saved search or document to another folder.
- Select **Delete** to permanently remove the search or document from your records.

### When documents are removed, replaced, or recategorized

Be aware that some documents may have been removed, replaced, or recategorized. Checkpoint uses **red text** to alert you to searches and documents with outdated source information. You can delete the outdated links and recreate them again if necessary.

RIA's editorial staff continuously updates Checkpoint's content because of changes in the law or for technical reasons, such as adding code to enable new functionality. Checkpoint issues warning messages to let you know that something is different about a document you have saved.

To preserve a document, you can use the Export feature to save a document to your computer or local server. This way, your copy of the document remains untouched by Checkpoint updates.

# Creating Folders

Checkpoint provides a screen called **Folders** for . You can create and organize your own folders for categorizing the documents or searches you save. You can create up to 250 folders in which you can save a maximum of 1000 searches and documents.

Checkpoint supports the creation of folders within folders, up to six levels of nested folders.

**To create a folder:**

1. On the top toolbar, click **Folders**.

   The **Folders** screen appears.

2. On the left navigation bar, click the **Create Folder** icon.

3. On the **Create Folder** window, enter a folder name.

4. Select **All Folders** to make the new folder a level 1 folder, or select a parent folder to nest the new folder under.

5. Click **Create**.

   The new folder is added to the **Folders** screen.

**To create nested folders:**

1. To make multiple-level folders, on the **Folders** screen, select a level 1 folder and click the **Create Folder** icon. Enter the new folder name and click **Create**.

2. Repeat step 1 until you have as many nested folders as you want, up to six levels.

# Deleting Folders

1. On the top toolbar, click **Folders**.

   The **Folders** screen appears.

2. Select the folder from the list of **All Folders** that you want to delete.

   **Note**: Deleting a folder also deletes all documents and subfolders in the folder.

3. On the left navigation bar, click the **Delete Folder** icon.

   **Note**: You may need to scroll up to see folder options.

4. On the **Confirm** dialog box, click **OK**.

# Moving Documents Between Folders

Checkpoint supports drag-and-drop functionality on the **Folders** screen, so you can either use the **Move** icon in the document tools, or drag and drop documents between folders.

**Moving documents using the Move icon:**

1. On the top toolbar, click **Folders**.

   The **Folders** screen appears.

2. Open the folder containing the documents you want to move.

3. Select the check box next to the name of each document to be moved.

4. From the document tools, click the **Move** icon.

   The **Move Items** window opens.

5. Select the folder to which the selected documents will be moved, or click **Create Folder** to create a new folder.

6. Click **Move**.

   Checkpoint moves the document to the new folder and readjusts the number count beside the two folders.

**Moving documents using the drag-and-drop feature:**

1. On the **Folders** screen, click the document icon next to the document you want to move.

2. Holding the left mouse button down, drag the icon to the folder where you want to move the document.

   Checkpoint moves the document to the new folder and readjusts the number count beside the two folders.

# Renaming Folders

1. On the top toolbar, click **Folders**.

   The **Folders** screen appears.

2. On the left navigation bar, select the folder you want to rename.
3. On the left navigation bar, click the **Rename Folder** icon.
4. Enter a new name for the folder.
5. Click **OK**.

# Using the Notes Feature

The **Notes** screen (accessed from the top toolbar) provides a list of all document notes and folder notes that you have created. Checkpoint displays entries for each note separately, based on the time stamp. For example, if a document has more than one note, each note has a separate line entry. The Notes screen has the following features.

| | |
|---|---|
| **Note Finder** | Provides a quick and easy way to find notes that you have associated with documents, folders, searches or tools. As you type keywords or phrases in the Note Finder field, Checkpoint displays matching notes from documents, folders, searches, or tools that you have previously associated with those keywords or phrases. Links are provided for previewing the document, running the search, or navigating to the associated folder. |
| **Multiple pages** | When the number of notes exceeds the number allowed per page, additional pages are added, and page numbers are displayed that you can select. |
| **Items per page** | You can change the number of notes displayed on a page. The default view is 50 notes. |
| **Item** | Sorts the list by title. |
| **Date** | Sorts the list by date. The default is to display the list of notes in reverse chronological order. |
| **Icons** | Displays the icons for the document that indicate whether the document has been flagged, has a document note, or has a folder note. |
| **More** | Long notes are truncated. Click the **more** link to display the full note. |
| **Highlight** | Displays highlighted content within any document. |
| **Edit** | Use the edit icon to edit a note. |
| **Delete** | Use the delete icon to remove a note from the Notes list. |

# Adding Notes to Documents

Checkpoint provides a feature that lets you add one or more notes to a document. You can also edit a note, delete a note, hide a note, or highlight text in a document and save it as a note. Notes can be displayed at the top of a document or hidden. Pay special attention to displaced notes messages, which let you know when significant changes to document text affects your notes.

You can add a note from the **Document** screen or the **Folders** screen. You can view all notes you have added from the **Notes** screen.

**Note**: You will be able to tell if a document has an attached note from the **Document** screen, **Folders** screen, **History** screen, and **Table of Contents** screen.

### Adding a note to a document on the Document screen:

1. Click the **Note** icon in the document tools.

2. On the **Add Note** window, enter the note text (200 characters maximum) and click the **Add** link.
3. Click **Save** to save the note and close the window.

   The note is added to the top of the document with a time/date stamp.
4. To add a new note, just click the **Note** icon again. You can add as many notes as necessary.

### Editing, deleting, hiding notes on the Document screen:

1. To edit a note, place your cursor in the **Notes** window. When the Edit icon appears on the right, click the icon. In the **Note** window, update the note and click **Save**.
2. To delete a note, place your cursor in the **Notes** window. When the Delete icon appears on the right, click the icon. At the confirmation message, click **OK**.
3. To hide just the text of a note from the **Notes** window, click the **Collapse Notes** icon in the right corner. Click the **Expand Notes** icon when you are ready to unhide the note text.

### Adding a note to a document on the Folders screen:

1. Click **Folders** in the top toolbar.
2. On the **Folders** screen, select the folder that contains the document.
3. Click the **Add Note** icon next to the document.
4. On the **Add Note** window, enter the note text (200 characters maximum).
5. Click **Save** to save the note and close the window.

   The note is attached to the document.

### Editing, deleting notes on the Folders screen:

1. Click the **Edit** icon to edit the note. After you make your changes, click **Save**.
2. The only way to delete the note is to edit it, remove all comments, and click **Save**.

### Hiding notes from all Checkpoint screens:

You can change a setting in Checkpoint to completely hide all notes.

1. From the **Document** screen, click the **Document Display Options** icon in the document tools.
2. When the **Document Display Options** window opens, clear the **Show Notes** check box.
3. Click **Close** to save the changes and close the window.

   The **Note** pane is hidden, but a note icon appears next to the document title indicating that a note is attached. You can click this icon to view the note text.

### Adding a note to highlighted text on the Document screen:

While viewing a document you can highlight content and embed notes.

1. Select the document text you want to highlight.

   The **Select Text Option**drop-down list appears automatically.
2. Click the **Highlight** option.

   The selected text is highlighted in **Orange.**
3. Click the highlighted text to view a pop-up menu that includes the **Add Note** and **Delete Highlight** options.
4. Click **Add Note** to display the note dialog.
5. Enter the note content.

   Once a note is created, a note icon is displayed in the left margin of the document. You can click this icon to view or modify the note. The note will also be added to the Notes screen, accessed from the top toolbar.

> **Note**: If you highlight text and add a note, and then choose to print the document, the note you added will be included as a footnote at the end. If you do not want your note to be printed, click the icon in the document tools to open the **Document Display Options** pop-up window. Click the **Print** tab and select the **Use the settings below for printing** option. Under Notes, uncheck the **Show Notes** option.

### Highlight and Add Note on the Document screen:

While viewing a document you can highlight and add note to the content simultaneously using the **Highlight & Add Note** option.

1. Select the document text you want to highlight.

   The **Select Text Option** drop-down list appears automatically.

2. Click the **Highlight & Add Note** option.

   The selected text is highlighted in orange and a pop-up is displayed to enter your notes.

3. Enter the note text in the Note window and click **Save**.

   Once the note is created a note icon is displayed in the left margin of the document. You can click this icon to view or modify the note.

### Editing an embedded note on the Document screen:

1. Click the highlighted text that has an embedded note.
2. From the pop-up menu, click **Edit Note**.

   The **Note** pop-up window opens.

   > **Note**: You can also click the note icon to open the Note pop-up window.

3. When the **Note** pop-up window opens, edit the note and click **Save**.

   Checkpoint saves the updated note.

### Deleting an embedded note on the Document screen:

1. Click the highlighted text that has an embedded note.
2. From the pop-up menu, click **Delete Note**.

   Checkpoint removes the embedded note from the highlighted text and also removes it from the Notes screen.

### Understanding displaced notes:

Many Checkpoint documents are updated periodically. If you highlight text in a document, and later come back to the document and find that the content you highlighted has changed significantly, your highlight may no longer match the original content. If this happens, Checkpoint adds a Displaced Notes message in the document.

# Highlighting Text and Embedding Notes

Checkpoint lets you highlight selected text anywhere within a document on the Document screen. You can also add an embedded note to associate with the highlighted text.

There are three reasons why you might get an error message when you highlight text:

- When you highlight too much text
- When you highlight text that is not supported (such as footnotes or popups or tool results)
- When what you highlighted is too complex

### Highlighting text on the Document screen:

While viewing a document you can highlight content using the Highlight option.

1. Select the document text you want to highlight.

   The **Select Text Option** drop-down list appears automatically.

2. Click the **Highlight** option.

   The selected text is highlighted in orange.

### Highlighting text and adding embedded notes on the Document screen:

1. Select the document text you want to highlight.

   The **Select Text Option** drop-down list appears automatically.

2. Click the **Highlight** option.

   The selected text is highlighted in orange.

3. Click the highlighted text to view a pop-up menu.
4. Click **Add Note** to display the Note window.
5. Enter the note text and click **Save**.

   Once the note is created a note icon is displayed in the left margin of the document. You can click this icon to view or modify the note.

### Highlight and Add Note on the Document screen:

While viewing a document you can highlight and add note to the content simultaneously using the **Highlight & Add Note** option.

1. Select the document text you want to highlight.

   The **Select Text Option** drop-down list appears automatically.

2. Click the **Highlight & Add Note** option.

   The selected text is highlighted in orange and a pop-up is displayed to enter your notes.

3. Enter the note text in the Note window and click **Save**.

   Once the note is created a note icon is displayed in the left margin of the document. You can click this icon to view or modify the note.

### Deleting highlights on the Document screen:

1. Click the highlighted text on the **Document** screen.

   A pop-up menu appears.

2. Click the **Delete Highlight** option.

   Checkpoint removes the highlight from the selected text.

### Deleting highlights and notes on the Document screen:

1. Click the highlighted text on the **Document** screen.

   A pop-up menu appears.

2. Click the **Delete Highlight & Note** option.

   Checkpoint removes the highlight from the selected text and deletes the embedded note.

### Printing highlighted text

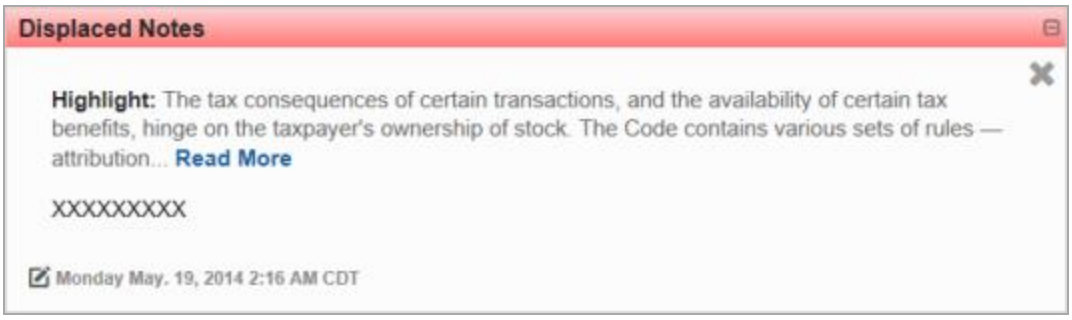
If you want to print just the highlighted text in a document, you can do so using the **Selected Text Option** in the document tools. Just select the highlighted text again, and then click **Print Selected Text** from the **Selected Text Option** drop-down list.

If you want to print the whole document with the highlighted text, click the **Print** icon in the document tools.

**Note**: If you highlight text and add a note, and then choose to print the document with the highlight, the note you added will be included as a footnote at the end of the document. If you do not want your note to be printed, you can click the icon in the document tools to open the **Document Display Options** pop-up window. Click the **Print** tab and deselect the **Show Notes** option.

# Understanding Displaced Notes

Many documents in Checkpoint are dynamic and are updated periodically. If you highlight text in a document, and later come back to the document and find that the content you highlighted has changed significantly, your highlight may no longer match the original content. If this happens, Checkpoint adds a **Displaced Notes** message in the document.


Displaced Notes
Highlight: The tax consequences of certain transactions, and the availability of certain tax benefits, hinge on the taxpayer's ownership of stock. The Code contains various sets of rules — attribution... Read More
XXXXXXXXX
Monday May. 19, 2014 2:16 AM CDT

Here are some features of displaced notes:

- The displaced notes message includes any text you highlighted previously and the date and time you created the highlight.
- You can expand the displaced note message box or collapse it using the button in the upper right corner.
- Click the **Read More** link to see the full text in a pop-up window.
- If you are in a subtopic, the displaced note appears at the top of the subtopic.
- If you are in a full topic, the displaced note is included within the specific subtopic that has the note.
- The displaced note also appears on the **Notes** screen, accessed from the top toolbar.
- You can delete a displaced message from the subtopic level by clicking the **X** on the right side of the message box. However, you cannot delete the message from the full topic level. When you delete a displaced note, you will see a message asking you to confirm the deletion.

# Flagging Documents

The Checkpoint Flagged Document feature allows you to quickly save a document for future review and reference. The number of flagged documents is visible next to Flagged in the Checkpoint top toolbar. A document's flagged state is designated by a special flag icon next to the document title.

## Flagging a Document

**To flag a document from the view document screen:**

Click the flag icon from the document tools. The icon will toggle to a gold color when a document is flagged.

**To flag a document from a Document List, Search Result List, or Table of Contents:**

Select the check boxes next to the documents you want to flag and click the flag icon in the document tools.

## Organizing Your Flagged Documents

Any flagged document displays a flag icon next to the title when you view the document in the My Folders view (or elsewhere in Checkpoint). You can move flagged documents to a folder by clicking the **Move Document** icon in the document tools. You can also print selected documents, export documents, or unflag documents using the **Flagged Documents** screen tools.

# Using History

Checkpoint's **History** screen stores research sessions for up to 14 days. (14 days do not have to be consecutive.) There is no limit on the number of searches or documents in a session history. Checkpoint automatically logs the session information and the research event, such as running a search or retrieving a document.

**Note**: Hovering your mouse pointer over **History** in the top toolbar displays a menu that shows a list of recent documents and a list of recent searches and tools documented on the **History** screen. You can click any of the links to open a document, search, or tool. If you click the **View All History** link at the bottom of the menu, you are taken directly to the **History** screen.

**To view History information:**

1. On the top toolbar, click **History**.

   The **History** screen appears, displaying the current day's activities.

2. On the left navigation bar, select the date range for which you want to see history.

3. In the **Items per page** drop-down list, choose how many items to view on a page.

   The default is 50 items. Select other numbers from the **Items per page** drop-down list. If more than one page of items is returned, **History** adds page number boxes at the top of the screen.

4. Use the **>** icon to advance to the next page, or the **>>** icon to advance to the last page. Use the **<** icon to return to the previous page, or the **<<** icon to return to the first page. You can also select a specific page box.

5. Click a document in the list to view its complete text.

**Note**: If you do not want to store your searches and viewed documents in the History tables, clear the **History** option under on the **Options** screen.

**To work with History information:**

- Narrow the display to only documents, searches, or tools by selecting the appropriate check box on the left navigation bar.
- Use the to manage an open document.
- Click a magnifying glass icon to re-execute the search and view results.
- Click the **Save** icon to save a search to a folder.
- Click a tool, such as a **Calculator**, to re-execute the function and show results.

# Using ACA Decision Support Tool

Use the ACA Decision Support Tool to understand the impact of the Affordable Care Act on a Buisness.
To access the tool:

1. On the **Tools** screen, click **ACA Decision Support Tool** on the left navigation bar.
   The **ACA Decision Support Tool** page is displayed.
2. Click the **Continue** button.
   You are directed to the **ACA Decision Support Tool** on TrackVia.

# Using AccuDraft - DocsEngine

AccuDraft's **DocsEngine for Pensions** is an online rules-based retirement plan document creation and management solution. With this tool, plan document providers can create and manage a wide variety of plans and plan-related documents.

You can automate creation of the ancillary documents needed to set up new clients, including transmittal letters, engagement letters, and service agreements, and host them on the system. You can use **DocsEngine for Pensions** to create these documents at the same time, using the same questionnaire that you used for your plan documents. You can also store and manage supporting materials such as investment schedules, tax returns, and e-mail correspondence.

**DocsEngine for Pensions** offers customizable, fully-automated reporting and analysis. Plan managers, administrators, and other authorized users can track and report on any piece of information contained within their plan documents.

## Logging in to DocsEngine for Pensions

If you are a DocsEngine for Pensions subscriber, you can access this product in Checkpoint.

**To log in to DocsEngine for Pensions:**

1. On the left navigation bar of the **Tools** screen, click **AccuDraft - DocsEngine**.
2. On the **AccuDraft-DocsEngine** screen, click **Continue**.
3. On the **DOCSENGINE** window, type your login information in the **Email** and **Password** fields.
4. Click **Login**.

Once logged in, you are taken to the **Document Main Console** where your list of previously created documents and folders are displayed.

## Creating a Document

**To create a new document:**

1. Click **Create Document**. The create document type appears.
2. Select the product you subscribe to (**DocsEngine for Pensions – Unlimited**) in the **Select Document Group** box.
3. Select the type of document you want to produce in the **Select Document Type** box.
4. Type the name of your client or a unique identifier in the **For a New Client** box, or select your client name or unique identifier from the **For an Existing Client** list.
5. Click **Proceed to Interview** to load the questions you will answer for the document you are creating.
6. After answering the questions in the interview, click **Submit**, and the system will generate your document package (for example, Plan, SPD, Administrative Policies).

## Modifying a Document

**To make changes to an existing document:**

1. Click the name of the document in the **Description** column of the **Document Main Console** or inside of a folder.

   The **Document Set Details** screen opens.

2. At the top of the screen, click the product **Redraft Document** or **Continue Interview** link. (The link will read "Redraft Document" if the document has previously been completed. It will read "Continue Interview" if the document has not been previously completed.)

   **Note**: If the document has previously been completed, upon clicking **Redraft Document** you will receive the following message:

   **There is already a finished document on file. In order to continue the redraft process your old document will be deleted. Do you want to continue?**

   You must click **OK** to this message for the interview to load. The message is saying that the Microsoft Word or Adobe PDF files that were created will be deleted, but not the answers you supplied in the interview. Upon completing your modifications and clicking **Submit**, the documents will be recreated.

3. The interview questions will load for you so you can complete or modify them. After answering or modifying the questions, click **Submit**, and the system will generate your document package (For example, Plan, SPD, Administrative Policies).

# Using Calculators

## General Calculators

Checkpoint provides more than 100 easy-to-use calculators in 10 different categories.

Click here to see the categories.

- **Auto**
- **Business**
- **Credit Card**
- **Investment**
- **Loan**
- **Mortgage**
- **Personal**
- **Retirement**
- **Savings**
- **Tax**

**To use the general calculators:**

1. On the **Tools** screen, click **Calculators** on the left navigation bar.
2. Expand a specific calculator category by clicking the "+" symbol next to the heading or click **Show All** to expand all of the calculator categories.
3. Click the name of the calculator that you want to use.
4. Enter data in the selected calculator's entry fields. If you need an explanation of a field, click the field label to display a description.
5. When you have completed data entry, click **Calculate** to view the results of the calculation and supporting information.

Document tools, including **Print**, **Export**, **E-mail**, **Save**, **Open**, and **Text** are available for preserving or sharing the calculation results.

## Payroll Calculators

Checkpoint provides five calculator tools for specific payroll functions.

**To use the payroll calculators:**

1. On the **Tools** screen, click **Calculators** on the left navigation bar.
2. Click **Payroll** on the left navigation bar.

3. Select the name of the payroll calculator that you want to use.
4. Enter data in the selected calculator's entry fields. If you need an explanation of a field, click the field label to display a description.
5. When you have completed data entry, click **Calculate** to view the results of the calculation and supporting information.

Printing options are accessible from the results screen.

## Depreciation Calculator

Use the **Depreciation Calculator** to determine depreciation deductions and generate depreciation schedules for MACRS assests.

**To use the Depreciation Calculator:**

1. On the **Tools** screen, click **Depreciation Calculator** on the left navigation bar.
   The **Depreciation Calculator** page is displayed.
2. Click the **Depreciation Calculator** link.
   The **Depreciation Calculator** opens in a new window. Follow the instructions on the **Overview** screen and navigate through the tool using the buttons provided at the bottom of the window to complete the process.

   **Alternate Path:** Table of Contents>Checkpoint contents>Federal Library>Federal Editorial Materials>Depreciation Calculator>Federal Depreciation Calculator

**Note:** The **Document Assembly** button in the **Federal Depreciation Calculator** has been renamed to **CALCULATOR**.

# Using Checkpoint World

**Checkpoint World™** is a platform designed for professionals working with cross border transactions of multinational corporations, to enable comprehensive global tax research. It is necessary to have subscribed to **Checkpoint World** to be able to use the platform.

**To access Checkpoint World:**

1. On the **Tools** screen, click **Checkpoint World** on the left navigation bar.

   The **Checkpoint World** page opens.

2. Click the **Continue** button.

   The **Checkpoint World Login** page opens in a new window.

3. Enter your user name and password in the respective fields.

4. Click **Login**.

# Using Cost Basis Plus

Checkpoint's **Cost Basis Plus** tool lets you research securities information needed to complete Form 1040, Schedules B and D.

**Cost Basis Plus** is an automated securities payment research tool that provides access to:

- Cash dividends – Interactive Data dividends going back to 1971
- Mutual fund dividends – back to 1971
- Cost basis with automated calculations – back to 1900 and earlier

Subscribers of **Cost Basis Plus** can access **Cost Basis Plus** from the **Tools** screen:

1. Click **Cost Basis Plus** on the left navigation bar.
2. On the **Cost Basis Plus** screen, click **Continue**.

**Cost Basis Plus** opens in a new window, from which you can select the type of securities research you want to conduct.

### Search Cost Basis Database

Search the entire Cost Basis database on user-defined variables.

### Search Dividends

Search Dividends database.

### Cost Basis Calculator

Compute cost basis and number of shares of a security.

# Using Create-a-Chart

The **Create-a-Chart** tool organizes selected chunks of information into comparative charts. For example, by selecting several tax issues and then selecting various jurisdictions, you can create a chart that compares each jurisdiction's laws pertaining to each selected issue. In addition to tax issues, **Create-a-Chart** tools are available for comparing financial information between companies (**SECPlus**) and for comparing official standards documentation between standard-setting bodies such as the SEC, AICPA, and FASB (**Standards Tracker**). Most charts provide links to official legal documentation and analysis. Subscribers to **Create-a-Chart** tools can access them from the **Tools** screen.

**To use a Create-a-Chart tool:**

1. On the **Tools** screen, click **Create-a-Chart** on the left navigation bar.
2. On the left navigation bar, click the name of the **Create-a-Chart** tool you want to use.
3. Follow the step-by-step instructions that guide you through making selections for the chart content.
4. Click the **Create the Chart** button.

Chart results can be preserved or shared, using the document tools **Print**, **Export**, **E-mail**, and **Save**.

Depending on your Checkpoint subscription, you may see any of the following **Create-a-Chart** tools listed when you click **Create-a-Chart** on the left navigation bar.

### State & Local

The **State Tax Create-a-Chart** tool compares tax law between states in four steps:

1. Select a tax type.
2. Select one or more chart types.
3. Select one or more states.
4. Click **Create the Chart**.

The resultant chart can be displayed in separate charts for each chart type, in a combined view with chart types as column headings, or in a combined view with states as column headings.

**Note**: On the State & Local Document screen, a **Find Chart Types** box is available under the the **Create-a-Chart** tab to help filter the chart list.

### e-Filing

The **e-Filing Tax Create-a-Chart** tool compares electronic tax filing rules between states in four steps:

1. Select a tax type.
2. Select one or more chart types.
3. Select one or more states.
4. Click **Create the Chart**.

The resultant chart can be displayed in separate charts for each chart type, in a combined view with chart types as column headings, or in a combined view with states as column headings.

### BNA State Tax Survey

The **BNA State Tax Survey Create-a-Chart** tool compares information from the most recent BNA State Tax Survey between states in three steps:

1. Select one or more chart types.
2. Select one or more states.
3. Click **Create the Chart**.

The resultant chart can be displayed in separate charts for each chart type, in a combined view with chart types as column headings, or in a combined view with states as column headings.

### BNA Green Incentives

The **BNA Green Incentives Create-a-Chart** tool compares federal and state tax (and non-tax) incentives that encourage the development and use of renewable energy and promote energy conservation in four steps:

1. Select one or more incentive types.
2. Select an application (Business Use, Individual Use or Producing/Manufacturing).
3. Select one or more states.
4. Click **Create the Chart**.

You can hide columns on the chart and display just the columns you want to research, such as Incentive, Dates, and Eligibility.

### Payroll Tax

The **Payroll Tax Create-a-Chart** tool compares payroll tax law between jurisdictions in three steps:

1. Select one or more chart types.
2. Select one or more jurisdictions.
3. Click **Create the Chart**.

The resultant chart can be displayed in separate charts for each chart type, in a combined view with chart types as column headings, or in a combined view with jurisdictions as column headings.

### US Tax Treaties

The **US Tax Treaties Create-a-Chart** tool compares tax treaties between countries in four steps:

1. Select a tax type.
2. Select one or more chart types.
3. Select one or more countries.
4. Click **Create the Chart**.

The resultant chart can be displayed in separate charts for each chart type, in a combined view with chart types as column headings, or in a combined view with countries as column headings.

### International Tax Rates

The **International Tax Rates Create-a-Chart** tool compares tax rates between international jurisdictions in three steps:

1. Select one or more chart types.
2. Select one or more jurisdictions.
3. Click **Create the Chart**.

The resultant chart can be displayed in separate charts for each chart type, in a combined view with chart types as column headings, or in a combined view with jurisdictions as column headings.

### IBFD Key Features

The **IBFD Key Features Create-a-Chart** tools compare tax information between jurisdictions. A separate tool is provided for countries, international states or provinces, and US states.

Each of the three IBFD Key Features Create-a-Chart tools compares tax information between jurisdictions in three steps:

1. Select one or more chart types.
2. Select one or more jurisdiction.
3. Click **Create the Chart**.

The resultant chart can be displayed in separate charts for each chart type, in a combined view with chart types as column headings, or in a combined view with jurisdictions as column headings.

### IBFD Interest & Penalties

The **IBFD Interest & Penalties Create-a-Chart** tool compares interest and penalties for tax law violations between international jurisdictions in three steps:

1. Select one or more chart types.
2. Select one or more jurisdictions.
3. Click **Create the Chart**.

The resultant chart can be displayed in separate charts for each chart type, in a combined view with chart types as column headings, or in a combined view with jurisdictions as column headings.

### SECPlus

The **SECPlus Financial Fundamentals Create-a-Chart** tool compares financial statement information between companies in five steps:

1. Select a company group or provide one or more company names or ticker symbols.
2. Select a reporting period and time frame.
3. Select a financial statement.

4. Select one or more financial statement components.
5. Click **Create the Chart**.

The resultant chart can be displayed either with financial statement components as column headings or with company names as column headings.You can switch between the two displays by clicking **Flip Axis**.

### Standards Tracker

The **Standards Tracker Create-a-Chart** tool compares standards documentation between selected issuing bodies (**AICPA**, **COSO**, **FASB**, **GASB**, **IASB**, **PCAOB**, or **SEC**) in seven steps:

1. Specify whether or not to include guidance and related materials in the chart results.
2. Select the date range in which activity was issued (optional step).
3. Select one or more issuing bodies.
4. Select the status of standards to be included in the chart.
5. Select an SEC form that is affected by the standards to be included in the chart or choose **All Forms**.
6. Enter keywords in the **Keywords** field (optional step).
7. Click **Create the Chart**.

The resultant chart can be sorted by column heading. Each standards document listed in the chart can be expanded to show summary information.

# Using Credits & Incentives

Use the Credits & Incentives tools to obtain tax incentive information pertaining to where you are physically located. You can view tax incentive information by address or by jurisdiction using the respective tools below:

### Pinpointer By Address

Access this template from the **Tools** screen. Select **Credits & Incentives** on the left navigation bar. The **Pinpointer By Address** template is displayed by default. To use the template, do the following:

1. Enter street details of your address into the **Street** field.
2. Enter details of City, State and/or Zip Code in the respective fields.
3. Click **Search**.
   Search results corresponding to the details entered are displayed on the screen in the **Addresses Found** section

   **Note**: On clicking **Search**, once the screen is refreshed, the button now displays **Search Again** allowing you to make any necessary address changes and search again.
4. Click the **View** link corresponding to the address for which you want to see the tax incentive information. Ideally this would be the address having the highest score in the **Match Score** column.

   The **Pinpointer by Address Results** page is displayed containing tax incentive information for the selected address.

   **Note**: You can click the **Map It** link corresponding to an address to view a google map of the location.
5. In the table, click the **Email** icon corresponding to a contact to send an email.
   An **Email Dialogue** box appears with the email address of the contact populated in the **To** field automatically.
6. In the table, click the **Permalink** icon under the **Website** column to launch the contact's website in a new window.
7. Click the **Plus** icon adjacent to **Expired Credits & Incentives** to expand and view the expired credits and incentives.
8. Use the document tools to manage the documents as per your requirement. You can generate a desired output (Excel, CSV, etc.,) of the search results by using the **Export** icon.

### Pinpointer By Jurisdiction

To use the **Pinpointer By Jurisdiction** template, do the following:

1. Go to the **Tools** screen.
2. Select **Credits & Incentives** from the left navigation bar.

3. Select **Pinpointer By Jurisdiction**. The **Pinpointer By Juridiction** screen is displayed.
4. Select the check box(es) corresponding to the jurisdiction(s) you are interested in searching.
5. Click **Next**.
6. On the screen that is displayed choose one or more Industries and Credit Types by selecting the corresponding checkboxes in the **Select Industries** and **Select Credit Types** sections.
7. Click the **Find Credits** button. The results are displayed on the **Pinpointer By Jurisdiction Results** screen.
8. Use the document tools to manage the documents as per your requirement. You can generate a desired output (Excel, CSV, etc.,) of the search results by using the **Export**.

To refine search results, choose required options from the **Credit Type** drop down. Similarly, use the drop down to select from **Tax Type** and **Industry** in the **View Options** section to further refine your search.

To view the complete details for a jurisdiction click the plus icon ⊞ adjacent to that jurisdiction in the table. You can also choose to expand all jurisdictions (in case of multiple jurisdictions selected) by selecting the **Expand All** check box above the table in the **View Options** section.

# Using DoneDeals

Checkpoint's **DoneDeals** tool lets you obtain corporate transaction details for private and public mid-market companies sold for purchase prices primarily between $1 million and $ billion.

With **DoneDeals**, you receive:

- Company contacts handling each deal, including name, address, and phone
- Price, terms, and sources of financing
- Seller financials, EBITDA, and price multiples for every transaction
- Key aggregate statistics and price multiple graphs for deals selected
- 24/7 access, with new transactions added weekly
- Search/sort functions
- Print and export capabilities

Subscribers of **DoneDeals** can access **DoneDeals** from the **Tools** screen.

1. Click **DoneDeals** on the left navigation bar.
2. On the **DoneDeals** screen, click **Continue**.

**DoneDeals** opens in a new window, within which you can enter search criteria and view search results.

# Using FASB Codification

Four **FASB Codification** user tools are provided on Checkpoint's **Tools** screen:

- **Cross Reference**
- **Join Sections**
- **Combine Subsections**
- **Topic Printing**

## Cross Reference

Use the **Cross Reference** tool to find the portion of FASB Codification that contains a standard, or to identify the standards that make up a portion of the codification. You can access **Cross Reference** from either the **Tools** screen or the **Search** screen.

To access Cross Reference from the Tools screen:

1. Click **FASB Codification** on the left navigation bar.
2. Click **Cross Reference** on the left navigation bar.

To access Cross Reference from the Search screen:

1. Click **Accting, Audit & Corp Finance** on the **Practice Area** drop-down list.
2. Click **FASB Cross Reference** in the **Go To** section of the left navigation bar.

To determine where an original standard (or portion of a standard) is located within the codification:

1. In the **By Standard** section, select a standard type from the **Type** drop down list.
2. Select the standard number from the **Number** drop-down list. The listed options are specific to the standard type you selected.
3. Enter a paragraph number (optional step).
4. Click **Submit** to view a report that shows you all locations in the codification where that standard has been codified.

To identify the standards that make up a specific portion of the codification:

1. In the **By Codification** section, enter the codification topic number in the **Topic** field.
2. Enter a subtopic number in the **Subtopic** field (optional step).
3. Enter a section number in the **Section** field (optional step).
4. Enter a paragraph number in the **Paragraph** (optional step).
5. Select **Submit** to view a report that shows the standards underlying the specified codification section.

**Note**: Entering specific search criteria, such as subtopic, section, and paragraph numbers, can be useful in narrowing your search results.

The resultant **Cross Reference** chart lists each specified standard number with its corresponding codification topic, broken down to the paragraph level. You can click a standard paragraph number or FASB codification paragraph to access the paragraph within the document where it resides. The document opens in a **Link Viewer** window.

## Join Sections

Use the **Join Sections** tool to select and combine multiple FASB Codification topics and subtopics into a single document.

To access the Join Sections tool:

1. On the Tools screen, click **FASB Codification** on the left navigation bar.
2. Click **Join Sections** on the left navigation bar.

To select and combine FASB codification content into a document:

1. Select a topic from the **Topic** drop-down list.
2. Select a section of the selected topic from the **Section** drop-down list. The listed sections are specific to the selected topic.
3. Specify whether you want to include intersection subtopics in the list of sections by selecting or clearing the **Include Intersection Subtopics** check box.
4. If you want to include SEC content or exclude FASB content from the list of sections, select or clear the **FASB** and **SEC** check boxes to indicate your choices.
5. In the list of sections generated by your selections, select the sections that you want to join together or select the check box on the heading bar to select all of the listed sections.
6. Click **Join Sections**.

The resultant document can be preserved or shared, using the document tools **Print**, **Export**, **E-mail**, and **Save**.

## Combine Subsections

Use the **Combine Subsections** tool to combine related FASB Codification subsections within a subtopic into a single viewable document.

To access the Combine Subsections tool:

1. On the **Tools** screen, click **FASB Codification** on the left navigation bar.
2. Click **Combine Subsections** on the left navigation bar.

To combine subsections within a subtopic into a single document:

1. Select a subtopic from the **Subtopic** drop-down list.

2. Select a section of the selected subtopic from the **Subsection** drop-down menu. The listed sections are specific to the selected subtopic.
3. In the list of sections generated by your selections, select the check boxes next to the sections that you want to join together or select the check box on the heading bar to select all of the listed sections.
4. Click **Combine Subsections**.

The resultant document can be preserved or shared, using the document tools **Print**, **Export**, **E-mail**, and **Save**.

## Topic Printing

Use the **Topic Printing** tool to print topics or selected content within a topic.

To access the Topic Printing tool:

1. On the **Tools** screen, click **FASB Codification** on the left navigation bar.
2. Click **Topic Printing** on the left navigation bar.

To print a topic, subtopic, or section:

1. Select a topic from the **Topic** drop-down menu.
2. Optionally, select the **Include Intersection Subtopics** check box.
3. If you want to include SEC content or exclude FASB content from the list of sections, select or clear the **FASB** and **SEC** check boxes to indicate your choices.
4. Indicate the subtopics and sections you want to print by selecting or clearing check boxes.
5. Click **Print Sections**.
6. Follow the on-screen print instructions to indicate print preferences and initiate printing of the selected content.

# Using GAAP Reporter

Use the **GAAP Reporter Explanations Printing** tool to find and print specific explanations, as per your requirements.

**To find and print explanations:**

1. On the **Tools** screen, click **GAAP Reporter** on the left navigation bar.

   The **Explanations Printing** page appears.

2. Select a topic from the **Topic** drop down list.

   **Note**: Steps 3 and 4 below are optional. You can choose to proceed to step 5 directly after this step

3. Select a subtopic from the **Subtopic** drop down list.
4. Select a section from the **Section** drop down list.
5. Click the **Get Explanations** button.

   The search results are displayed on the lower half of the same page.

6. Select the check box for the explanation(s) you want to print. Or, you could select the check box in the column header to print all the explanations that appear in the search results.
7. Click the **Print Explanations** button.

   The explanations are displayed in a new window.

8. Enter the required details in the **Print** dialog box that is displayed and click **Print**.

   **Note**: For large print requests a **Progress Bar Indicator** appears in a separate window, this is followed by the regular print dialog window.

# IASB/FASB Mapping

Use the IASB/FASB Mapping tool to create a chart that matches IASB standard content to FASB Codification content. To access the tool, go to the **Tools** screen and click **IASB/FASB Mapping** in the left navigation bar. Select either **IASB Standard to FASB** or FASB to **IASB Standard** depending on which mapping you want to use.

## IASB Standard to FASB

To create the IASB Standard to FASB chart:

1. Select an IASB Standard from the **Standards** drop-down field.
2. Optionally select a Paragraph from the **Paragraphs** drop-down field.
3. Select **Yes** or **No** in the **Include Related Analysis** field.
4. Click **Submit** to generate the chart.

The generated chart displays a Subject, IASB Standard and the related FASB codification content and analysis. Click a link in the chart to view that content on the Checkpoint Table of Contents. Click the + and - icons to expand or collapse a section. The currently selected section is highlighted in green.

## FASB to IASB Standard

To create the FASB to IASB Standard chart:

1. Select a FASB Codification Topic, Subtopic, and Section from the **Select FASB Codification Reference** drop-down fields. Subtopic and Section are optional selections.
2. Optionally enter a FASB paragraph number in the **Paragraph** field.
3. Select **Yes** or **No** in the **Include Related Analysis** field.
4. Click **Submit** to generate the chart.

The generated chart displays the FASB codification content and related IASB Standard and any related analysis. Click a link in the chart to view that content on the Checkpoint Table of Contents. Click the + and - icons to expand or collapse a section. The currently selected section is highlighted in green.

# Using I-Metrix

**I-Metrix** is a subscription-based tool that lets users retrieve detailed financial information directly in a Microsoft Excel® spreadsheet. Users can pull data into their own spreadsheets or choose from several industry-specific models.

Subscribers initially install **I-Metrix** from within Checkpoint. Once the product is installed, users can open it in Excel.

**To install I-Metrix:**

1. From the **Tools** screen, select **I-Metrix** on the left navigation bar.
2. Click **Install my I-Metrix** to access the installation screen.
3. Follow the onscreen instructions to begin downloading and installing the tool.

# Using i-Tables

Checkpoint's interactive tables, or **i-Tables**, tool provides customized templates for finding information in Applicable Federal Rates (AFR) tables or in IRS Valuation tables. You can access **i-Tables** from the **Tools** screen or from the **Search** screen with one of the following practice areas selected from the Practice Area drop-down list:

- **Federal**
- **Estate Planning**
- **Pension & Benefits**

**To use the i-Tables tool:**

1. Click **i-Tables** on the left navigation bar. On the **Search** screen, **i-Tables** appears in the navigation bar's **Go To** section.
2. Select the **i-Table** template that you want to use.
3. Provide all requested information. Data entry requirements differ depending on the template.
4. Click **Search** if using the AFR Table, or click **Calculate** if using one of the IRS Valuation Tables.

The resultant document can be preserved or shared, using the document tools **Print**, **Export**, **E-mail**, and **Save**.

# Using Interactive Checklists

The Financial Reporting **Interactive Checklists** tool provides a process to help you work through complex compliance procedures.

**To access an Interactive Checklist:**

1. On the **Tools** screen, click **Interactive Checklists** on the left navigation bar.
2. Click the + symbol next to one of the sources listed on the **Interactive Checklists** screen to view a list of its checklists.

   If a list of sub-sources appears, click the + symbol next to one of the sub-sources to view a list of its checklists.
3. Select the checklist you want to use. The checklist opens in a **Checkpoint | Interactive Document Popup** window.

## Interactive Checklists Powered by HotDocs

The Interactive Checklist interface is divided into two panes:

The Checklist Interview Outline pane (left side) contains an outline view of the checklist template. You can use the outline to navigate to a different checklist section by clicking any of the displayed titles.

The Checklist Interview pane (right side) contains the interview questions and additional content. Answer the guided questions to progress through the interview. Some other features to note:

- A selected answer can be removed by clicking on the gray x that appears to the right of answered questions.
- Below certain interview questions, there may be Help buttons (Notes, Tips, Cautions, etc.) that contain important relevant guidance. When these buttons are clicked, the additional guidance will display below the interview question and answer fields. In certain circumstances, you will be presented the option to include this guidance in the assembled checklist.
- Use the navigation toolbar at the bottom of the interview pane to move forwards and backwards through the checklist interview.
- Click **Finish** to view the collected interview answers and generate an assembled checklist containing the interview results.
- A series of three asterisks displays in any unanswered Checklist fields when exporting and/or printing. Customers can print a "blank" Checklist without these asterisks by exporting to RTF, then performing a search and replace of the asterisks through MS Word.

The toolbar at the top of the Interactive Checklist interface provides access to a number of features:

| Icon | Feature |
|---|---|
| | Toggle the Checklist Interview Outline (left pane) open and closed. |

| Icon | Feature |
|---|---|
| | Save the Interactive Checklist answers to a folder. |
| | Import answers from a previously saved Checklist in a folder to fill unanswered question fields. |
| | Print the Checklist from your PDF Reader. |
| | Export the Checklist to RTF or PDF. |
| | Preview the completed or in-progress Checklist. |
| | Open the online help system. |

## Saving a Checklist

You can save a completed or in-progress Interactive Checklist interview to your Checkpoint Folders by clicking the icon in the toolbar or by selecting **Finish** after finishing the interview process.

1. In the Save Interactive Checklist dialog, select a folder to save to.
2. Enter a name for the checklist you want to save. By default, it will use the Checkpoint title of checklist template.
3. Enter any notes (optional).
4. Click **Save**.

# Interactive Decision Tools

With **Interactive Decision Tools**, you can easily address frequently encountered yet challenging tax and accounting issues. Using a dynamic interview format, the tools walk you through the decision-making process, presenting information and answers relevant to your specific situation.

**Important**: The first time you try to access an Interactive Decision Tool, Checkpoint will check to see if Microsoft *Silverlight 3* or greater is installed. If it is not installed, you will be prompted to install the plug-in.

**Note**: If you have an issue seeing Checkpoint citations, it is important that you turn off your browser **pop-up blocker**.

Interactive Decision Tools are available from the Checkpoint **Tools** screen. To access a decision tool, select **Interactive Decision Tools** from the left menu and click a decision tool title from the list of tools in the right pane.

The process of completing a Decision Tool is a self-guided interview. Answer the prompted questions appropriately for the scenario you are researching and move forward through the interview. Once enough information has been gathered by the tool, it will offer a conclusion about your scenario based on your responses. Depending on the conclusions reached, you may be able then generate a results document for record keeping, filing, or audit purposes.

The main decision tool interface is divided into two panes:

- The Interview Outline pane (left side) contains an outline view of the decision tool's step-by-step interview process. This outline dynamically updates as you proceed through the interview. You can use the outline to navigate to a different step by clicking it's title.
- The Interview pane (right side) contains the interview questions and content. Answer the guided questions to progress through the interview. Use the navigation toolbar at the bottom of the interview pane to move forwards and backwards through the interview screens. Click to **Finish** to view the collected interview answers and generate an assembled .RTF document of the interview results.

The toolbar at the top of the Decision Tools interface provides access to a number of a features:

| Icon | Feature |
|---|---|
| | Toggle the Interview Outline (left pane) open and closed. |
| | Save the current interview answers to a folder. |
| | Import saved answers from a folder to fill unanswered question fields. |
| | View a summary of the completed answers. |
| | Open the online help system. |

## Saving a Decision Tool

You can save a completed or in-progress Decision Tool interview to your Checkpoint Folders by clicking the icon in the toolbar or by selecting **Save Answers** from the **Interview Complete** dialog after finishing the interview process.

1. In the Save Interactive Decision Tool dialog, select a folder to save to.
2. Enter a name for the Decision Tool you want to save. By default, the Checkpoint title of the Decision Tool will be used.
3. Enter any notes (optional).
4. Click **Save**.

When viewing saved documents in your Checkpoint folders, saved Decision Tools will be designated by the icon.

## Need to Calculate

Some Interactive Decision Tools provide a **Need to Calculate** button for calculating results from a series of questions asked in the tool's interview forms.

Click the**Need to Calculate** button to open a calculation worksheet. In the worksheet, complete any applicable fields. The results of the calculation will appear at the bottom of the form.

# Using International Tax Tools

Checkpoint's **Tools** screen provides access to six subscriber-only **International Tax Tools**, provided in cooperation with Orbitax:

- **International Tax Expert**
- **International Compliance Expert**
- **International Tax Management Expert**
- **International Tax Research and Compliance Expert**
- **Transfer Pricing Analyzer**
- **ONESOURCE™ Transfer Pricing**

**To access International Tax Tools:**

1. From the **Tools** screen, select **International Tax Tools** on the left navigation bar and then click the link for the tool you want to access.
2. Click **Continue** to access the tool.

### International Tax Expert

Features include advanced tax rate look-up tables, optimization of withholding taxes, and cross-border tax calculator. **International Tax Expert** provides tools for researching and calculating tax information for more than 75 countries. You can also use planning tools that help you structure transactions that minimize withholding taxes or calculate the net tax cost of projected transactions. In addition, **International Tax Expert** gives you easy access to online publications, including tax treaties, country tax commentary, and a monthly newsletter.

### International Compliance Expert

**International Compliance Expert** provides tax rate look-up tables, domestic and international checklists of compliance issues, and relevant tax forms translated into English for more than 65 countries.

### International Tax Management Expert

**International Tax Management Expert** provides tools to help you manage tax information for your global organization. Its central dashboard format lets you organize your worldwide entities into a central online spreadsheet, track daily tax activity, research and analyze worldwide tax rates and compliance rules (including recent tax changes affecting the countries in which you operate), attach documents, spreadsheets, and presentations, and store tax compliance rules and forms translated into English for your global entities.

### International Tax Research and Compliance Expert

**International Tax Research and Compliance Expert** International Tax Research and Compliance Expert gives you all the content and tools you need to put your tax research into action, including a global tax treaty database, detailed country analysis, advanced tax rate look-up tables, a cross-border tax calculator, a withholding tax optimizer, and planning tools that help you structure transactions that minimize taxes and calculate the net cost of projected transactions. It also provides an interactive tax calendar, compliance checklists, an interest and penalty calculator, and translated tax forms for over 90 countries.

### Transfer Pricing Analyzer

**Transfer Pricing Analyzer** enables quick access to transfer pricing rules in key OECD and emerging market jurisdictions, aggregates relevant news on Checkpoint by jurisdiction, and provides forms, regulations, and templates to enhance productivity.

### ONESOURCE Transfer Pricing

**ONESOURCE™ Transfer Pricing** helps multinational corporations manage intercompany transactions. The rise of transfer pricing regulation and enforcement in the international community makes transfer pricing an important tax compliance consideration. **ONESOURCE Transfer Pricing** provides a complete transfer pricing solution for multinational corporations seeking to increase productivity and reduce costs for the management of their intercompany transactions.

# Using Nexus Assistant

**Nexus Assistant** is a subscription-based state tax tool that helps you create a complete summary of any state's known positions on a variety of business activities and compare with how different states treat the same activities, with links to more in-depth information. Subscribers can access **Nexus Assistant** from the **Tools** screen.

**To use Nexus Assistant:**

1. On the **Tools** screen, select **Nexus Assistant** in the left navigation bar.
2. Select a **Tax Type** and click **Next**.
3. Make a selection from the **Select Topics** list. If you select **Select Topics/Subtopics**, you can select one or more topics or subtopics from an expanded list.

> **Note**: A **Find Topics** box is available for the **Select Topics/Subtopics** option to help filter the topic list.

4. Select one or more **States**.
5. Click **Create Summary** to continue to the results screen.

## Nexus Assistant Results

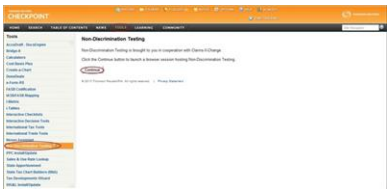
The results of the **Nexus Assistant** display in a chart format. You have the option to view state summaries in separate charts or in a combined chart. **Nexus Assistant** results can be preserved or shared, using the document tools **Print**, **Export**, **E-mail**, and **Save**.

# Using Non-Discrimination Testing

Non-Discrimination Testing is an Internet-based nondiscrimination testing tool that covers Code Sec. 125 (Cafeteria Plans), Code Sec. 105(h) (Health FSA, HRA, Self-Insured Medical Plans), and Code Sec. 129 (Dependent Care FSA Plans).

**To access Non-Discrimination Testing:**

1. Go to the **Tools** screen.
2. Click the **Non-Discrimination Testing** option from the **Tools** menu on the left.
3. When the page loads, click the **Continue** button.



4. You are directed to the **Non-Discrimination Testing** site. Log in using your Checkpoint username and password.

**Note:**Alternatively, a **Nondiscrim Test** button has been placed in the **II. Cafeteria: The Short Course** materials to view the **Non-Discrimination Testing** site:

**Path**: Table of Contents>Checkpoint Contents>Pension & Benefits Library>Pension & Benefits Editorial Library>Pension & Benefits Compliance Library>Cafeteria Plans< II. Cafeteria Plans: The Short Course.

Non-discrimination testing using NDX is as simple as 1-2-3:

1. Download an Excel template and populate the data
2. Upload the Excel spreadsheet
3. Download reports

NDX Reports include:

- Detailed test results
- List of employees in the prohibited groups such as Key, HCE, etc.
- Recommendations for passing certain tests that fail

# Using PPC Install/Update

The **PPC Install/Update** tool lets you install and update **Checkpoint Tools for PPC**, a set of PPC process and workflow tools that use Microsoft® Word and Excel. The **PPC Install/Update** tool resides on the **Tools** screen and is accessible from most of the practice areas on the **Search** screen.

**Checkpoint Tools for PPC** include the following.

| | |
|---|---|
| **PPC's Practice Aids™** | Editable Microsoft® Word and Excel versions of all of the practice aids in the related PPC Guide - about 100+ documents for each title. |
| **PPC's SMART Practice Aids™** | Innovative tools that bring advanced functionality to your licensed **PPC's Practice Aids** products. You can use **SMART Practice Aids** to automate significant audit processes, including risk assessment, internal control, disclosure, IFRS disclosure, single audit, and field work. |
| **PPC's Workpapers™** | Additional workpapers not available in the **PPC Guides** or **Tax Deskbooks**. The Excel-based templates have advanced diagnostics, dynamically changing content, and more automation. |
| **PPC's Interactive Disclosure Libraries™** | Excel versions of **PPC's Disclosure Checklists**, linked to Word-based examples for each required disclosure. Hundreds of example disclosures are included. |
| **PPC's Engagement Letter Generator™** | Word-based application that covers all common audit, attest, compilation, review, tax, and consulting engagements. Automated tools help you tailor the letters to your engagement and format them for printing. |

**To access Checkpoint Tools for PPC from the Tools screen:**

1. Click **PPC Install/Update** on the left navigation bar
2. Click **Install/Update** to access and install **Checkpoint Tools for PPC**.

**To access Checkpoint Tools for PPC from the Search screen:**

1. Click one of the following practice areas on the **Practice Area** drop-down list:
    - **Federal**
    - **Estate Planning**
    - **Pension & Benefits**
    - **Payroll**
    - **Accting, Audit & Corp Finance**
2. Click **PPC Install/Update** in the **Go To** section of the left navigation bar.
3. Click **Install/Update** to access and install **Checkpoint Tools for PPC**.

The **Product Install Wizard** identifies which of your licensed **Checkpoint Tools for PPC** are not yet installed as well as those that are already installed but need updates.

# Using Sales & Use Rate Lookup

The **Sales & Use Rate Lookup** tools let you retrieve state and local sales and use rates for any jurisdiction in the United States. You can view summaries of up-to-date rates presented in easy-to-read tables.

To access the **Sales & Use Rate Lookup** tool, click **Sales & Use Rate Lookup** on the left navigation bar of the **Tools** screen.

**Sales & Use Rate Lookup** consists of three tools:

- **Search by State and County or City Name**
- **Search by Zip or Zip+4**
- **Compare Rates**

## Search by State and County or City Name

You can search for sales and use rate information by identifying a particular jurisdiction:

1. On the **Tools** screen, click **Sales & Use Rate Lookup** on the left navigation bar.

   A sub-menu appears under **Sales & Use Rate Lookup**.
2. Click **By State, County, City** on the left navigation bar.
3. On the **Sales & Use Rate Lookup** screen, select a state to search from the **State** drop-down list.
4. Provide the name of the county or city you want to search in one of the following ways:
   - To provide only a county name, select the county from the **County** drop-down list.
   - To provide a county name and a city name, select the county from the **County** drop-down list, and then select the city from the **City Name** drop-down list.
   - To provide only a city name, type the city name in the **City Name** field without first selecting a county.
5. Click **Search**.

The **Sales & Use Rate Lookup Results** screen displays a table of sales and use rates for the city or county you selected. Select a link in the table for a closer look at a specific zip code.

## Search by Zip or Zip+4

You can search for sales and use rate information by zip code:

1. On the **Tools** screen, click **Sales & Use Rate Lookup** on the left navigation bar.

   A sub-menu appears under **Sales & Use Rate Lookup**.
2. Click **By Zip Code** on the left navigation bar.

3. In the **Zip Code** field, enter the zip code of the location you wish to search. You can enter the zip code in either the 5-digit or 9-digit format with no dashes or spaces.
4. Click **Search**.

The **Sales & Use Rate Lookup Results** screen displays a table of sales and use rates for the zip code you selected. Select a link in the table for a closer look at a city within the zip code.

### Compare Rates

The **Compare Rates** tool includes three search tools:

- **Search by State and County or City Name**
- **Search by Zip or Zip+4**
- **Compare Rates**

The **Search by State and County or City Name** and **Search by Zip or Zip+4** are identical to the first two **Sales & Use Rate Lookup** tools, except that they each include an **Effective Date** field. By entering a date, you can view prior period sales and use rates for a specified state, county, city, or zip code. Prior rates are available for periods after 2/1/2007.

To use the **Compare Rates** tool:

1. On the **Tools** screen, click **Sales & Use Rate Lookup** on the left navigation bar.

   A sub-menu appears under **Sales & Use Rate Lookup**.
2. Click **Compare Rates** on the left navigation bar.
3. In the **Compare Rates** section of the **Sales & Use Rates Lookup** screen, specify the beginning date of a date range by typing the date in the **Start Effective Date** field or by clicking the calendar symbol and selecting the date.
4. Specify the end date of the date range by typing the date in the **End Effective Date** field or by clicking the calendar symbol and selecting the date.
5. Select the type of rate you want to search from the **Rate Type** drop-down list. The choices are:
   - **Consumers use**
   - **Rental**
   - **Sales**
   - **Sellers use**
6. From the **State** list, select the state or jurisdiction you want to search.

   You have the option to save a jurisdiction for future use or retrieve a previously saved jurisdiction as part of the current search criteria.

7. Optionally, you can select the check box to have monthly rate changes e-mailed at or near the end of the month.
8. Click **Search**.

The **Sales & Use Rate Lookup Results** screen displays a table of the rate type for the selected jurisdiction within the specified date range. Rate changes are represented by multiple listings within a county, city, zip code, or location, with all comparative sales and use rate information provided. Select a link in the table for a closer look at a zip code within the state.

# Using Single Audit Compliance

**PPC's Single Audit Compliance Program Creator** is a subscription-based tool that assembles pages of the OMB A-133 Compliance Program into a concise audit program tailored to a specific federal award program and type of entity.

**To use PPC's Single Audit Compliance Program Creator:**

1. On the **Tools** screen, click **Single Audit Compliance** on the left navigation bar.
2. On the **PPC's Single Audit Compliance Program Creator** window, click **Continue**.

The application opens in a separate window, where subscribers can select the edition that corresponds to the effective date of the single audit or program. Answer a few questions about the federal award program and your client to obtain a custom audit program that includes all relevant information.

# Using State Apportionment

The **ONESOURCE™ State Apportionment planning** tool lets multi-state tax professionals automate the process of determining the impact of changes—internal or external—on their company's effective tax rate. **ONESOURCE State Apportionment planning** is a subscription-based tool.

**To use ONESOURCE State Apportionment planning:**

1. On the **Tools** screen, click **State Apportionment** on the left navigation bar.
2. Review information on the **ONESOURCE™ State Apportionment planning** screen. Note options to link to the **Getting Started Checklist** and the **5 Easy Steps to Start Planning tutorial**.
3. When you are ready to open the application, click **Start Planning**.

The application opens in a separate window. You can now create a base scenario that includes your organization's structure, filings, monetary data, and tax rules. Then make a copy of the scenario to explore planning options. **ONESOURCE State Apportionment planning** includes a **Compare** feature that you can use to analyze the differences between the base scenario and the planning scenario.

# Using State Tax Chart Builders (BNA)

The **State Tax Chart builders (BNA)** tool organizes selected chunks of information into charts. For example, by selecting several tax topics and then selecting various jurisdictions, you can create a chart that compares information pertaining to the selected topics in each jurisdiction.

**To use a State Tax Chart builders (BNA) tool:**

1. On the **Tools** screen, click **State Tax Chart builders (BNA)** on the left navigation bar.
2. On the left navigation bar, click the name of the **State Tax Chart builders (BNA)** tool you want to use.
3. Follow the step-by-step instructions that guide you through making selections for the chart content.
4. Click the **Create the Chart** button.

Chart results can be preserved or shared, using the document tools **Print**, **Export**, **E-mail**, and **Save**.

Depending on your Checkpoint subscription, you may see any of the following **State Tax Chart builders (BNA)** tools listed when you click **State Tax Chart builders (BNA)** on the left navigation bar.

## Corporate Income Tax

The **Corporate Income Tax** tool compares information on corporate income tax related topics between states in four steps:

1. Select one or more topics.
2. Click **Next**.
3. Select one or more states.
4. Click **Create the Chart**.

The resultant chart is displayed. You can choose to view the chart with the axes interchanged by clicking the **Flip Axis** button.

## Green Incentives

The **Green Incentives** tool compares tax information regarding incentives between jurisdictions in five steps:

1. Select one or more incentive types.
2. Select the application of the incentive that you are interested in searching
3. Click **Next**.
4. Select one or more jurisdictions.
5. Click **Create the Chart**.

The resultant chart is displayed. You can choose to sort the information in the chart by incentive or by jurisdiction by clicking the respective column title in the header row of the chart.

## Individual Income Tax

The **Individual Income Tax** tool compares information on individual income tax related topics between

states in four steps:

1. Select one or more topics.
2. Click **Next**.
3. Select one or more states.
4. Click **Create the Chart**.

The resultant chart is displayed. You can choose to view the chart with the axes interchanged by clicking the **Flip Axis** button.

### Sales & Use Tax

The **Sales & Use Tax** tool compares information on sales & use tax related topics between jurisdictions in four steps:

1. Select one or more topics.
2. Click **Next**.
3. Select one or more jurisdictions.
4. Click **Create the Chart**.

The resultant chart is displayed. You can choose to view the chart with the axes interchanged by clicking the **Flip Axis** button.

# Using Tax Developments Wizard

The **Income Tax Developments Wizard** lets you create a customized quarterly compilation of news updates covering federal, state, and international corporate income tax. FASB Interpretation No. 48 (FIN 48) requires corporate tax departments to review information that may impact uncertain tax positions on a quarterly basis. Companies also require this type of review and sign-off as part of their internal controls under Sarbanes-Oxley Section 404. The **Income Tax Developments Wizard** automates the process. **Income Tax Developments Wizard** is a subscription-based tool.

**To use the Income Tax Developments Wizard:**

1. On the **Tools** screen, click **Tax Developments Wizard** on the left navigation bar.
2. Select one or more jurisdictions and click **Next**.
3. Select one or more income tax topics and click **Next**.

> **Note**: A **Find Topics** box is available to help filter the topic list.

4. Select a date range by indicating the end date of a quarter or beginning and end dates.
5. Click **Search**.

The results can be sorted by jurisdiction or topic. Subscribers have the option to export the results to a Microsoft® Excel (.xls) or Word (.doc) format or in an RTF (.rtf) format. You also can save the search to **Folders** and schedule the wizard to perform a quarterly search using the search criteria you provided. In addition, the results can be preserved or shared, using the document tools **Print**, **Export**, **E-mail**, and **Save**.

# Using WG&L Install/Update

The **WG&L Install/Update** tool lets you install and update **Checkpoint Tools for WG&L**, a set of documents providing expert WG&L analysis and guidance that use Microsoft® Word and Excel. **WG&L Install/Update** is a subscription-based tool that resides on the **Tools** screen and is accessible from most of the practice areas on the **Search** screen.

**Checkpoint Tools for WG&L** include:

- Editable workpapers
- Step-by-step audit programs
- Practical tips and suggestions
- Related checklists, forms, confirmation letters, and other essential tools for performing specific steps

**To access Checkpoint Tools for WG&L from the Tools screen:**

1. Click **WG&L Install/Update** on the left navigation bar.
2. Click **Install/Update** to access and install **Checkpoint Tools for WG&L**.

**To access Checkpoint Tools for WG&L from the Search screen:**

1. Click one of the following practice areas on the **Practice Area** drop-down list:
   - **Federal**
   - **Estate Planning**
   - **Pension & Benefits**
   - **Payroll**
   - **Accting, Audit & Corp Finance**
2. Click **WG&L Install/Update** in the **Go To** section of the left navigation bar.
3. Click **Install/Update** to access and install **Checkpoint Tools for WG&L**.

The **Product Install Wizard** identifies which of your licensed **Checkpoint Tools for WG&L** are not yet installed as well as those that are already installed but need updates.

# Using Form/Line Finder

The **Form/Line Finder** tool lets you search for tax guidance by year, form, and optionally, schedule and line number. You can access Form/Line Finder from either the **Search** screen or the **Table of Contents** screen.

**To use Form/Line Finder:**

1. Access **Form/Line Finder** in one of the two following ways:
    - On the **Search** screen, click **Federal** on the **Practice Area** drop-down list, and then click **Form/Line Finder** in the **Go To** section of the left navigation bar.
    - On the **Table of Contents** screen, click **Form/Line Finder** in the **Jump To** section of the left navigation bar.
2. On the **Form/Line Finder** screen, enter the tax year you want to research in the **Enter Tax Year** field.
3. Enter the form number in the **Enter Form Number** field.
4. Optionally, provide a line number in the **Form/Schedule Line Number** field or a tax schedule in the **Schedule** field.
5. Click **Go** to begin the search.

# Using Document Assembly

The **Document Assembly** feature lets you create customized documents from standard practice aid templates. You also can enter variable information one time and have it carry throughout the document.

Documents that are enabled with the **Document Assembly** capability display a **Document Assembly** button within the document body. When you click the button, Checkpoint displays the document in a template format.

The main document assembly interface is divided into two panes:

- The Interview Outline pane (left side) contains an outline view of the document template's step-by-step interview process. This outline dynamically updates as you proceed through the interview. You can use the outline to navigate to a different step by clicking its title.
- The Interview pane (right side) contains the interview questions and content. Answer the guided questions to progress through the interview. Use the navigation toolbar at the bottom of the interview pane to move forwards and backwards through the interview screens. Click to **Finish** to view the collected interview answers and generate an assembled .RTF document of the interview results.

The toolbar at the top of the Document Assembly interface provides access to a number of a features:

| Icon | Feature |
|---|---|
| | Toggle the Interview Outline (left pane) open and closed. |
| | Save the current interview answers to a folder. |
| | Import saved answers from a folder to fill unanswered question fields. |
| | View a preview of the competed document. |
| | View a summary of the completed answers. |
| | Open the online help system. |

## Saving a Document

You can save a completed or in-progress Document Assembly interview to your Checkpoint Folders by clicking the icon in the toolbar or by selecting **Save Answers** from the **Interview Complete** dialog after finishing the interview process.

1. In the Save Interactive Document dialog, select a folder to save to.
2. Enter a name for the Document you want to save. By default, the Checkpoint title of the Interactive Document template will be used.
3. Enter any notes (optional).
4. Click **Save**.

## Pre-HotDocs Document Assembly Templates

Some Document Assembly templates use an older layout and functionality. Eventually all of these templates will be converted to use the HotDocs interface and features detailed above. If you are using an older Document Assembly template, the following buttons appear at the top of the template:

| | |
|---|---|
| **Save Answers** | Lets you save the information you have entered in the document. At a later time, you can use your input, or answers, as a starting point when you use the document again in the future. This information is saved in a Checkpoint folder. You must provide the name of the folder that will store your answers, and you must assign a name to the answers being stored. Optionally, you can include a note to be stored with the saved answers. |
| **Get Answers** | Lets you retrieve a saved document. At a point in the future when you use the same document, you may be able to save time in completing the data entry by reusing saved answers. Checkpoint lists all saved answer items stored in **Folders**. Select the one you want to use. All of the data entry fields will now be repopulated with the information you previously entered and saved. You can complete the template by reviewing each field and making any necessary updates. |
| **Preview** | Displays the document in its current state in one of several formats with your input highlighted in green. Any fields that have not been completed are highlighted in yellow. |
| **Assemble** | Prepares the document in its completed state in one of several available formats, including HTML, Microsoft Word, PDF, and RTF. |
| **Update Form** | Applies any changes to the document that the system would normally apply prior to performing a **Save Answers**, **Preview**, or **Assembly** function. |

Complete the template by entering applicable data into the provided fields and use the buttons to preview, assemble, save, or update the document.

# Using Speedlink

**Speedlink** is a downloadable tool that resides in your desktop system tray and, optionally, as a desktop icon, and provides you with access to Checkpoint and many of its key features. By storing your login ID and password in Speedlink's **Preferences** area, you can obtain immediate access to a selected Checkpoint tool or feature without manually logging in.

**To download Speedlink:**

1. Navigate through your browser to http://ria.thomsonreuters.com/speedlink.
2. Click the **Download Speedlink** link.
3. Follow the onscreen instructions for downloading and installing **Speedlink**.

## Using the Speedlink Features

When you click the **Speedlink** task system icon, the **Speedlink** menu opens in a browser window. The **Speedlink** menu includes a range of search tools and quick links to Checkpoint content. The features and tools available to you in **Speedlink** are subscription sensitive. Some of the tools available include:

- **Form/Line Finder**
- **Code Search**
- **Federal Tax Handbook Search**
- **Keyword Search**

In addition, several sub-menus let you access accounting content, training and support, and additional tools. Subscribers to e-Form RS can link to the e-Form RS application.

Clicking the **Go to Checkpoint** link opens Checkpoint in the normal way according to your **General Settings** selections in Checkpoint's **Options**.

Each tool and sub-menu is displayed in a separate pane inside the **Speedlink** menu. These panes can be organized and arranged in any configuration. To move a pane, click the pane's title bar with your left mouse button and drag it to the new position.

## Preferences

To change your Checkpoint login information, click the Speedlink system tray icon with your right mouse button and select **Preferences**.

# Using News Features

Checkpoint provides a comprehensive News service that gives you instant access to the most up-to-date taxation news and developments. It features in-depth articles on tax-related issues, as well as links to informative taxation newsletters, journals, and compliance aids. News materials are updated regularly.

News articles can be categorized by practice area, so you can easily view the latest news for the subjects of most interest to you, namely Federal, State and Local, International, Pension and Benefits, Estate Planning, Payroll, and Accounting, Audit & Corp Finance. You can set preferences for views, e-mail, and display in the News area of the **Options** screen.

**To access News Services:**

1. Click the **News** menu.
2. Select a **News Service** from the drop-down list.

    - **RIA Daily Updates** is your source for the latest tax news and developments. A link at the top right of this screen allows you to **Set Display/E-mail Preferences**. Click here to see more information about using **RIA Daily Updates**.
    - **Accounting & Compliance Alert** is a daily news service that fully informs accounting & auditing and corporate finance professionals of critical developments. A link at the top right of this screen allows you to **Set Display/E-mail Preferences**. Click here to see more information about using the **Accounting & Compliance Alert**.
    - **BNA's Daily Tax Report™** is a tax news and analysis service that appears each business day. Click here to see more information about using **BNA's Daily Tax Report™**.
    - **BNA's International Tax Monitor™** provides the latest news on events and information regarding international taxation. It appears each business day. Click here to see more information about using **BNA's International Tax Monitor™**.
    - **IBFD Tax News Service** provides the latest news on events and information regarding international tax treaties. Click here to see more information about using **IBFD Tax News Service**.
    - **PPC's Daily Update** provides regular tax and A&A news and articles from PPC's Five Minute Tax Briefing, PPC's Accounting & Auditing Update, PPC's Governmental Update, PPC's Nonprofit Update, and PPC's PCAOB Audits - Current Developments. Click here to see more information about using **PPC's Daily Update**.
    - **Towers Watson** provides access to exclusive content such as the Executive Compensation Resources Newsletter, Research Memos, and the Daily Media Watch. Click here to see more information about using the **Towers Watson News Library**.
    - **EBIA Weekly** provides articles on all significant developments within the scope of EBIA reference manuals. A link at the top right of this screen allows you to **Set Display/E-mail Preferences**. Click here to see more information about using the **EBIA Weekly**.

- **Sabrix VAT News** provides news and articles on the most recent Sabrix VAT update. Current articles are listed by the countries involved. Click here to see more information on using **Sabrix VAT News**.

**Note**: Depending on your subscription options, you may not have access to all of these news sources.

# Searching the RIA Newsletter Library

You can search the RIA newsletter library via the search template accessible from the **RIA Daily Updates** screen.

**To search for a newsletter:**

1. Click the **News** menu.
2. On the left navigation bar, select **RIA Daily Updates** from the **News Service** drop-down list.
3. On the left navigation bar, click the **Search RIA Newsletters** link.

   The **RIA Newsletters Templates Available** screen appears.
4. Use the **Select an RIA Newsletter to Search** drop-down list to select one or more newsletters you want to search.
5. Optionally, indicate a date range to filter your search. Type dates in the **From:** and **To:** fields, or use the calendar icon to select dates.
6. Enter terms to define your search in the **Keywords** field, or select the Thesaurus/Query Tool for more advanced search features.
7. Click **Search** to view results.

# PPC's Daily Update

PPC's Daily Update is your source for the latest tax and A&A news and developments from PPC's Five-Minute Tax Briefing.

**To access PPC's Daily Update:**

1. Click the **News** menu.
2. Select **PPC's Daily Update** from the **News Service** drop-down list.

   The Five-Minute Tax Briefing appears. You can use the document tools to manage the document.
3. Click a reference link within the **Five Minute Tax Briefing** to view the complete reference content.
   - Use the document tools to manage the document.
   - Use the top line links (availability depends on the document) to view related documents or track new citations to the document.
4. From the open document, click **Maximize** to display the document navigation features. You can navigate to other documents in several ways:
   - At the top right of the screen, use the **Navigate by: Contents** forward and reverse arrows to advance to the next document or return to the previous document.
   - If documents are listed on the left navigation bar, you can select the document title to view its content.

     **Note**: When you open a document, the left navigation bar changes to a **Contents** drill-down list and links to the current and other documents in the report section you opened.

     **Note**: You may see "# Hidden Documents" on the **Contents** tab. The tab is designed to list the currently displayed document and its “neighboring” documents as they appear in the **Table of Contents**. For example, if you opened the 11th document in the list, the **Contents** tab displays "10 Hidden Documents." Your open (11th) document follows at the top of the list so you do not have to scroll down to find it. To access the 10 "hidden" documents, click the **# Hidden Documents** link.
   - On the left navigation bar, use the **Contents** list to go to any level on the drill-down list.

     **Note**: Clicking in the drill-down list takes you out of the **News** screen and into the **Table of Contents** screen.
5. Within the current **Five-Minute Tax Briefing**, scroll down to view the previous newsletter.
6. On the left navigation bar, use the **Go To** feature to view other PPC publications.

Other ways you can view PPC's **Five-Minute Tax Briefing** information:

- You can customize News E-mail/Display options so that you receive **PPC News** by e-mail.
- You can search past issues from the **Table of Contents** menu.

# Accounting & Compliance Alert

The **Accounting & Compliance Alert** is a daily news service that fully informs accounting and auditing and corporate finance professionals of critical developments. Expert analysis increases efficiency and productivity by illustrating how events affect subscribers and best practices for reacting to them. Subscribers can focus their subscriptions by filtering coverage by topic or news source. The end result is the highly effective delivery of information with the depth and breadth appropriate to the individual.

**To access the Accounting & Compliance Alert:**

1. Click the **News** menu.
2. Select **Accounting & Compliance Alert** from the **News Service** list.

   The current issue of the **WG&L Accounting & Compliance Alert** appears. On the left navigation bar, several features let you navigate this and other documents:

   - Links to sections in the current Alert.
   - **News Flash** lets you see recent updates on this news service if you have requested it on the **Options** screen.
   - **Search News & Articles** lets you search for specific information by news area, date range, topic, and keywords.
   - **Browse Recent News** lets you review up to 6 months of archived information categorized alphabetically.
   - **Go To** links to previous issues and other reports.

3. On the document pane at right, click the title of a news article to view its content. Use the document tools to manage the document.
4. From the open document, click **Maximize** to display the document navigation features. You can navigate to other documents in several ways:

   - At the top right of the screen, use the **Navigate by: Contents** forward and reverse arrows to advance to the next document or return to the previous document.
   - If documents are listed on the left navigation bar, you can select the document title to view its content.

   **Note**:When you open a document, the left navigation bar changes to a **Contents** drill-down list and links to the current and other documents in the Alert section you opened, for example, SEC News or Governance News.

   **Note**: You may see "# Hidden Documents" on the **Contents** tab. The tab is designed to list the currently displayed document and its neighboring documents as they appear in the **Table of Contents**. For example, if you opened the 11th document in the list, the **Contents** tab displays

"10 Hidden Documents." Your open (11th) document follows at the top of the list so you do not have to scroll down to find it. To access the 10 "hidden" documents, click the **#Hidden Documents** link.

- On the left navigation bar, use the **Contents** list to go to any level on the drill-down list.

**Note**: Clicking in the drill-down list takes you out of the **News** screen and into the **Table of Contents** screen.

Other ways you can view **Accounting & Compliance Alert** information:

- You can customize News E-mail/Display options so that you receive the **Accounting & Compliance Alert** by e-mail.
- You can search past issues from the **Table of Contents** menu.

# BNA Daily Tax Report

**BNA's Daily Tax Report™** is a tax news and analysis service that appears each business day.

Click here to see the sections the report contains.

- Highlights
- Text
- Also in the News
- Federal Tax & Accounting
- State Tax & Accounting
- International Tax & Accounting
- Tax Decisions & Rulings
- Taxcore Text
- Calendar
- Table of Cases
- Code Section Index

**To access the BNA Daily Tax Report™:**

1. Click the **News** menu.
2. On the left navigation bar, select **BNA Daily Tax Report** from the **News Service** drop-down list.

   The current issue of the **BNA Daily Tax Report™** appears on your screen. You can use the document tools to manage the document.
3. On the left navigation bar, several features let you navigate this and other documents:
   - Links to sections in the current report.
   - **Search Daily Tax Reports** lets you search for specific information by section name, topic/title, case name, author, issue date, state, and keywords.
   - **Go To** links to previous issues of the tax report.
4. On the open document, click the document icon at the end of an article to view the complete text. Use the document tools to manage the document.
5. From the open document, click **Maximize** to display the document navigation features. You can navigate to other documents in several ways:
   - At the top right of the screen, use the **Navigate by: Contents** forward and reverse arrows to advance to the next document or return to the previous document.

- If documents are listed on the left navigation bar, you can select the document title to view its content.

  **Note**: When you open a document, the left navigation bar changes to a **Contents** drill-down list and links to the current and other documents in the report section you opened.

  **Note**: You may see "# Hidden Documents" on the **Contents** tab. The tab is designed to list the currently displayed document and its “neighboring” documents as they appear in the **Table of Contents**. For example, if you opened the 11th document in the list, the **Contents** tab displays "10 Hidden Documents." Your open (11th) document follows at the top of the list so you do not have to scroll down to find it. To access the 10 "hidden" documents, click the **# Hidden Documents** link.

- On the left navigation bar, use the **Contents** list to go to any level on the drill-down list.

  **Note**: Clicking in the drill-down list takes you out of the News screen and into the Table of Contents screen.

Other ways you can view **BNA Daily Tax Report** information:

- You can customize News E-mail/Display options so that you receive the **BNA Daily Tax Report** by e-mail.
- You can search past issues from the **Table of Contents** menu.

# BNA International Tax Monitor

The BNA International Tax Monitor™ is an international tax news and analysis service that appears each business day.

**To access the BNA International Tax Monitor:**

1. Click the **News** menu.
2. On the left navigation bar, select **BNA Int'l Tax Monitor** from the **News Service** drop-down list.

   The current issue of the **BNA International Tax Monitor** appears. You can use the document tools to manage the document.
3. On the left navigation bar, several features let you navigate this and other documents:
   - Links to sections in the current report.
   - **Search BNA Int'l Tax Monitor** lets you search tax monitors by issue date and keywords.
   - **Go To** links to previous issues of the tax monitor.
4. On the open document at right, click the document icon at the end of an article to view the complete text. Use the document tools to manage the document.
5. From the open document, click **Maximize** to display the document navigation features. You can navigate to other documents in several ways:
   - At the top right of the screen, use the **Navigate by: Contents** forward and reverse arrows to advance to the next document or return to the previous document.
   - If documents are listed on the left navigation bar, you can select the document title to view its content.

     **Note**: When you open a document, the left navigation bar changes to a **Contents** drill-down list and links to the current and other documents in the report section you opened.

     **Note**: You may see "# Hidden Documents" on the **Contents** tab. The tab is designed to list the currently displayed document and its “neighboring” documents as they appear in the **Table of Contents**. For example, if you opened the 11th document in the list, the **Contents** tab displays "10 Hidden Documents." Your open (11th) document follows at the top of the list so you do not have to scroll down to find it. To access the 10 "hidden" documents, click the **# Hidden Documents** link.
   - On the left navigation bar, use the **Contents** list to go to any level on the drill-down list.

     **Note**: Clicking in the drill-down list takes you out of the **News** screen and into the **Table of Contents** screen.

Other ways you can view **BNA International Tax Monitor** information:

- You can customize News E-mail/Display options so that you receive **the BNA International Tax Monitor** by e-mail.
- You can search current and past issues from the **Table of Contents** menu.

# IBFD Daily Tax News Service

Checkpoint's **International Bureau of Fiscal Documentation (IBFD) Tax News Service** provides updated news and articles about international tax treaties. Current articles are listed by the countries involved.

**To access IBFD Daily Tax News Service:**

1. Click the **News** menu.
2. On the left navigation bar, select **IBFD Tax News Service** from the **News Service** drop-down list. The current issue of the **IBFD Tax News Service** appears on your screen. You can use the document tools to manage the document.
3. On the left navigation bar, several features let you navigate this and other documents:
    - Links to sections in the current report, listed alphabetically by country.
    - **Go To** links to previous issues.
4. On the open document at right, click links within the document icon to view the complete text. Use the document tools to manage the document.
5. From the open document, click **Maximize** to display the document navigation features. You can navigate to other documents in several ways:
    - At the top right of the screen, use the **Navigate by: Contents** forward and reverse arrows to advance to the next document or return to the previous document.
    - If documents are listed on the left navigation bar, you can select the document title to view its content.

      **Note**: When you open a document, the left navigation bar changes to a **Contents** drill-down list and links to the current and other documents in the report section you opened.

      **Note**: You may see "# Hidden Documents" on the **Contents** tab. The tab is designed to list the currently displayed document and its “neighboring” documents as they appear in the **Table of Contents**. For example, if you opened the 11th document in the list, the **Contents** tab displays "10 Hidden Documents." Your open (11th) document follows at the top of the list so you do not have to scroll down to find it. To access the 10 "hidden" documents, click the **# Hidden Documents** link.
    - On the left navigation bar, use the **Contents** list to go to any level on the drill-down list.

      **Note**: Clicking in the drill-down list takes you out of the **News** screen and into the **Table of Contents** screen.

Other ways you can view **IBFD Tax News Service** information:

- You can customize News E-mail/Display options so that you receive the **IBFD Tax News Service** by e-mail.
- You can search past issues from the **Table of Contents** menu.

# Towers Watson News

Subscribers to Checkpoint's **Towers Watson News** have access to exclusive content such as the **Executive Compensation Resources Newsletter**, **Legislative and Regulatory Updates** and the **Plan Documents**.

**To access Towers Watson™ news:**

1. Click the **News** menu.
2. On the left navigation bar, select **Towers Watson** from the **News Service** drop-down list.

   The current issue of **Towers Watson News** appears. You can use document tools to manage the document.

You can also customize your News E-mail/Display settings so that you receive the **Executive Compensation Resources Newsletter** and **Legislative and Regulatory Updates** by e-mail each day.

# EBIA Weekly

Checkpoint's Employee Benefits Institute of America (EBIA) Weekly provides updated news and articles about Employee Benefits law and compliance.

**To access the EBIA Weekly newsletter:**

1. Click the **News** menu.
2. On the left navigation bar, select **EBIA Weekly** from the **News Service** drop-down list.

   The current issue of **EBIA Weekly** appears. You can use the document tools to manage the document.
3. On the left navigation bar, several features let you navigate this and other documents:
   - **Search EBIA Weekly** lets you search for specific information by topics, types, issue date range, and keywords.
   - **Go To** links to previous issues of the newsletter.
4. On the open document, click the document icon at the end of an article to view the complete text. Use the document tools to manage the document.
5. From the open document, click **Maximize** to display the document navigation features. You can navigate to other documents in several ways:
   - At the top right of the screen, use the **Navigate by: Contents** forward and reverse arrows to advance to the next document or return to the previous document.
   - If documents are listed on the left navigation bar, you can select the document title to view its content.

     **Note**: When you open a document, the left navigation bar changes to a **Contents** drill-down list and links to the current and other documents in the newsletter section you opened.

     **Note**: You may see "# Hidden Documents" on the **Contents** tab. The tab is designed to list the currently displayed document and its “neighboring” documents as they appear in the **Table of Contents**. For example, if you opened the 11th document in the list, the **Contents** tab displays "10 Hidden Documents." Your open (11th) document follows at the top of the list so you do not have to scroll down to find it. To access the 10 "hidden" documents, click the **# Hidden Documents** link.
   - On the left navigation bar, use the **Contents** list to go to any level on the drill-down list.

     **Note**: Clicking in the drill-down list takes you out of the **News** screen and into the **Table of Contents** screen.

Other ways you can view **EBIA Weekly** information:

- You can customize News E-mail/Display options so that you receive **EBIA Weekly** by e-mail.
- You can search past issues from the **Table of Contents** menu.

# American Association of Exporters and Importers Newsletter

The American Association of Exporters and Importers (AAEI) is the oldest and most influential professional group in international trade, dedicated to advocacy and education enhancing its members, and promoting the interests of international trade professionals. Its weekly newsletter, the **AAEI International Trade News Alert**, is considered required reading by serious trade practitioners, brokers, consultants, transshipment specialists, and others. Now, the **Alert** is available in Checkpoint, exclusively.

### To access the AAEI Newsletter:

1. Click the **News** menu.
2. Select **AAEI International Trade News Alert** from the **News Service** list.

   The current issue of the **AAEI International Trade News Alert** appears. On the left navigation bar, several features let you navigate this and other documents:

   - Links to sections in the current Alert.
   - **Go To** links to previous issues and other reports.

3. On the document pane at right, click the title of a news article to view its content. Use the document tools to manage the document.
4. From the open document, click **Maximize** to display the document navigation features. You can navigate to other documents in several ways:

   - At the top right of the screen, use the **Navigate by: Contents** forward and reverse arrows to advance to the next document or return to the previous document.
   - If documents are listed on the left navigation bar, you can select the document title to view its content.

### To receive the AAEI International Trade Alert Newsletter in your E-mail everyday:

1. Go to **Options** and select **News E-mail/Display** from the left pane.
2. Select **AAEI International Trade News Alert** from the **News E-mail/Display** drop down.
3. Click and check the box next to **AAEI International Trade News Alert** in the main display screen.
4. Select **Save and Close**.

# Sabrix VAT News

Sabrix VAT News provides news and articles on the most recent Sabrix VAT update. Current articles are listed by the countries involved.

**To access Sabrix VAT News:**

1. Click the **News** menu.
2. On the left navigation bar, select **Sabrix VAT News** from the **News Service** drop-down list.

   The current issue of the **Sabrix VAT News** appears on your screen. You can use the document tools to manage the document.
3. On the left navigation bar, several features let you navigate this and other documents:
   - Links to sections in the current report.
   - **Go To** links to previous issues of the Sabrix VAT News.

# Searching the Accounting & Compliance Alert

You can search for news and articles via the **Search Accounting & Compliance Alert** template.

**To use the Search Accounting & Compliance Alert template:**

1. Click the **News** menu.
2. On the left navigation bar, select **Accounting & Compliance Alert** from the **News Service** drop-down list.
3. On the left navigation bar (you may have to scroll down), select the **Search News & Articles** link to open the **Search Accounting & Compliance Alert** template.
4. Select the check boxes to search **Daily News** and/or **Featured Articles**.
5. Select the check boxes for the **News Areas** you want to search.
6. Optionally, indicate a date range to filter your search. Type dates in the **From:** and **To:** fields, or use the calendar icon to select dates.
7. Select the check boxes for the **Topics** you want to search.
8. Enter terms to define your search in the **Keywords** field, or select the Thesaurus/Query Tool for more advanced search features.
9. Click **Search** to view results.

# Searching the BNA Daily Tax Report

You can search tax report archives via the **BNA Daily Tax Report** search template.

**To search for a tax report:**

1. Click the **News** menu.
2. On the left navigation bar, select **BNA Daily Tax Report** from the **News Service** drop-down list.
3. On the left navigation bar, click the **Search Daily Tax Report** link.

   The **BNA Daily Tax Report & TaxCore Templates Available** screen appears. Use any of the template fields to narrow your search:

   - Section Name
   - Topic/Title
   - Case Name
   - Author
   - Issue Date
   - Select a State

   **Note**: These fields are all optional but can filter your search to return a more focused set of results.

4. Enter terms to define your search in the **Keywords** field, or select the Thesaurus/Query Tool for more advanced search features.
5. Click **Search** to view results.

# Searching the BNA International Tax Monitor

You can search international tax archives on the **BNA International Tax Monitor** search template.

**To search for international tax information:**

1. Click the **News** menu.
2. On the left navigation bar, select **BNA Int'lTax Monitor** from the **News Service** drop-down list.
3. On the left navigation bar, click the **Search BNA Int'l Tax Monitor** link.

   The **BNA International Tax Monitor Templates Available** screen appears.
4. Optionally, use the **Issue Date** field to narrow your search. Enter the date, or use the calendar icon to select a date.
5. Enter terms to define your search in the **Keywords** field, or select the Thesaurus/Query Tool for more advanced search features.
6. Click **Search** to view results.

# Searching the EBIA Weekly

You can search employee benefits news and articles via the **EBIA Weekly** search template.

**To search for a benefits newsletter:**

1. Click the **News** menu.
2. On the left navigation bar, select **EBIA Weekly** from the **News Service** drop-down list.
3. On the left navigation bar, click the **Search EBIA Weekly** link.

   The **Search EBIA Weekly** template appears.
4. Select the check boxes for the **Topics** you want to search.
5. Select the check boxes for the **Types** you want to search.
6. Optionally, indicate a date range to filter your search. Type dates in the **From:** and **To:** fields, or use the calendar icon to select dates.
7. Enter terms to define your search in the **Keywords** field, or select the Thesaurus/Query Tool for more advanced search features.
8. Click **Search** to view results.

# Searching the Towers Watson News Library

You can search **Towers Watson™ News** archives from search templates available from the **Towers Watson News** screen. Three search templates are available:

- Exec Comp Newsletter (Executive Compensation Resources Newsletter)
- Research Memos
- Plan Documents

**To access the templates:**

1. Click the **News** menu.
2. On the left navigation bar, select **Towers Watson** from the **News Service** drop-down list.
3. On the left navigation bar, click the **Search Towers Watson** link.
4. On the left navigation bar, select a template.
5. Define search parameters, based on the template you select.

| Template | Search Parameters |
|---|---|
| **Exec Comp Newsletter** | **Categories**<br>**Date Range** (optional)<br>**Keywords** |
| **Research Memos** | **Categories**<br>**Date Range** (optional)<br>**Keywords** |
| **Plan Documents** | **Plan Types**<br>**Executive Title** (if you select these Plan Types: All Plan Types, Consulting Agreement, Employment Contract, or Golden Parachute Agreement/Plan)<br>**Agreement Type** (if you select these Plan Types: All Plan Types, Consulting Agreement, Employment Contract, or Golden Parachute Agreement/Plan)<br>**Plan Feature**<br>**Date Range** (optional)<br>**Keywords** |

6. Click **Search** to view results.

# Using News & Insight on Checkpoint

**News & Insight** brings together in one location Checkpoint and Reuters coverage of tax and accounting developments – expertly arranged by practice area.

**To access News & Insight on Checkpoint:**

1. Click the **News** menu.
2. On the left navigation bar, select **News & Insight** from the **News Service** drop-down list. The **News & Insight Home** page is displayed.
3. On the left navigation bar, convenient jump links let you navigate to **News & Insight** practice area pages.
    - Depending on your subscription, you can link to news updates on **Federal Tax**, **State & Local Tax**, **Accounting, Audit & Corporate Finance** and **Pension & Benefits**.
4. To make **News & Insight** your default location when accessing the Checkpoint **News** tab:
    a. Click the **Options** link on the Checkpoint toolbar
    b. Click **News**
    c. Click **News Service**
    d. Click the **News & Insight** radio box
    e. Click **Save and close**

**Note**: Depending on your subscription options, you may not have access to all of these news sources.

# News - News Flash

When there is a new piece of important news available in your News content, the **Home** screen displays a **News Flash** link under **Today's Headlines**. Click the link to view the item.

**To access the news flash from the News menu:**

1. Click the **News** menu.
2. Navigate to the newsletter content that has the **News Flash** available by selecting the newsletter you want from **News Service** drop-down list.

   If the newsletter has a **News Flash** available, a link and icon appear in the left navigation bar.
3. Click the **News Flash** link to display the content.

> **Note**: You must have the **News Flash** option selected for a specified newsletter or news service to see **News Flash** updates. Set up the **News Flash** in the News E-mail/Display area of the **Options** screen.

# RIA Daily Updates

Use the News feature to explore summaries of Checkpoint's published news items. If an article grabs your attention, you can access its full text with a click of your mouse.

**To access the RIA Daily Update:**

1. Click the **News** menu.

   **RIA Daily Updates** is the default view when you open the **News** menu. However, if you have changed the default on the Options screen or have selected another news service during this Checkpoint session, you can follow the next step to access **RIA Daily Updates**.

2. On the left navigation bar, select **RIA Daily Updates** from the **News Service** drop-down list.

   The current **RIA Daily Update** appears. You can use the document tools to manage the document.

3. Select a **Date** from the drop-down list if you want to see something other than the current date.

4. On the left navigation bar, several features let you navigate this and other documents:

   - Links to sections in the current report.
   - **Newsletter Library** link lets you access other newsletters that are part of your subscription.
   - **Search RIA Newsletters** link lets you search some or all RIA newsletters by date range and keywords.
   - **State Legislative Highlights** link lets you search for Legislative Highlights of states and tax types you are interested in, by date range.
   - **State Proposed Legislation** link lets you search for current year State Proposed Legislation of states you are interested in, by states, date range and status.
   - **WG&L Tax Journals** link lets you access WG&L Tax Journals that are part of your subscription.

5. On the **RIA Tax Watch** list at right, click the document title at the beginning of each summary or the links within a summary to view the complete text.

   - Use the document tools to manage the open document.
   - Use the top line links (availability depends on the document) to view related documents or track new citations to the document.

6. From the open document, click **Maximize** to display the document navigation features. You can navigate to other documents in several ways:

   - At the top right of the screen, use the **Navigate by: Contents** forward and reverse arrows to advance to the next document or return to the previous document.
   - If documents are listed on the left navigation bar, you can select the document title to view its content.

**Note**: When you open a document, the left navigation bar changes to a **Contents** drill-down list and links to the current and other documents in the report section you opened.

**Note**: You may see "# Hidden Documents" on the **Contents** tab. The tab is designed to list the currently displayed document and its “neighboring” documents as they appear in the **Table of Contents**. For example, if you opened the 11th document in the list, the **Contents** tab displays "10 Hidden Documents." Your open (11th) document follows at the top of the list so you do not have to scroll down to find it. To access the 10 "hidden" documents, click the **# Hidden Documents** link.

- On the left navigation bar, use the **Contents** list to go to any level on the drill-down list.

**Note**: Clicking in the drill-down list takes you out of the **News** screen and into the **Table of Contents** screen.

# Time Tracking

Use the **Time Tracking** feature to assign time spent in Checkpoint to projects. You must create a **Time Tracking** project before you can begin tracking your Checkpoint time. The project metrics can then be printed or exported into your time and billing system to bill back Checkpoint research time to your clients.

### To view the Time Tracking project list upon login:

1. On the top toolbar, click **Options**.
2. On the left navigation bar, click **Time Tracking**.
3. Select the check box for **Display project list after login**.
4. Click **Save and close**.

   The **Time Tracking - Project List** dialog box appears on your screen each time you log in to Checkpoint.
5. Log out of Checkpoint and log back in if you want to use **Time Tracking** now.

### To create a Time Tracking Project

1. Click the **Create a Project** button in the **Time Tracking - Project List** dialog box.

   The **Create a Project** dialog box appears.
2. Enter an **Identifier**, such as the client's name or account number.
3. Optionally, enter **Description 1** and **Description 2** fields.

   We recommend using the same categorization system you use in your billing system. This facilitates importing **Time Tracking** information into your billing system.
4. Optionally, enter **Employee ID** and **Notes**.
5. Click **Save**.

Alternatively, you can create a time tracking project from the **Create a Project** pane of the **Time Tracking** screen:

1. On the top toolbar, click **Time Tracking**. The **Time Tracking** screen is displayed.
2. Click **Create a Project** on the left navigation bar. The **Create a Project** pane is displayed on the right.
3. Enter an **Identifier**, such as the client's name or account number.
4. Optionally, enter **Description 1**, **Description 2**, **Employee ID** and **Notes** in the respective fields.
5. Click **Save**.

### To track time for a project:

1. In the **Time Tracking - Project List** dialog box, select the project you want to begin tracking, and then click **Continue**.

Checkpoint takes you to the **Home** screen. All time spent in Checkpoint for the current session will be assigned to the selected project.

2. Proceed to perform your research tasks in Checkpoint.
3. To track time for another project, log out of Checkpoint, and then log in again.

Alternatively, you can track time for a project from the **Project List** pane of the **Time Tracking** screen:

1. On the top toolbar, click **Time Tracking**. The **Time Tracking** screen is displayed.
2. Click **Project List** on the left navigation bar.
3. On the **Project List** pane displayed on the right, select the project you want to begin tracking, and then click **Continue**.

Checkpoint takes you to the **Home** screen from where you can proceed to perform your research tasks in Checkpoint. All time spent in Checkpoint for the current session will be assigned to the selected project.

**Note**: If you want to stop tracking time for projects, in the **Time Tracking - Project List** dialog box or on the **Project List** pane of the **Time Tracking** screen, select the **Don't assign my time to a project** option, and then click **Continue**.
If you click **Cancel**, your settings will not be saved and you will be logged out of Checkpoint. At the confirmation message, click **OK** to logout or **Cancel** to return to the **Time Tracking** dialog box.

### To manage the project list:

1. Manage projects by using the following columns on the **Project List** pane:
   - The **Last Tracked** column displays the date and time of the last session tracked for the associated project.
   - The **Manage** column contains **View** and **Delete** links.
2. Click **View** to display additional details about the project, such as **Start** and **Duration** times for each session.

   When you click **View**, the left navigation bar includes an **Edit** link.
3. Optionally, on the left navigation bar, click **Edit** to change any of the project setup or to add notes for each session.
4. Optionally, click **Delete** to delete the project.

### To create a Time Tracking Report

1. On the top toolbar, click **Time Tracking**.
2. On the left navigation bar, select **Create a Report**.
3. Select a **Report Type**.

   The report type formats make each one better suited to a specific use:

- **Billing Report** - This report type displays all project and session data in a single tabular layout. It is ideal for importing the **Time Tracking** session data into an external billing system.
- **Project Report** - This report type breaks out each project into a separate set of organized tables. Use this report to review project and session data.

4. Select one or more projects to include in the report.

   The default is **Select All**.

5. Select a date range for sessions to include in the report. Enter dates directly in the fields or use the calendar icon to select dates.

6. Select **Show Report** or **Export Report**.

   If you select **Show Report**, you can then use document tools to **Print** or **Export** the document.

   If you select **Export Report**, you will be prompted to define the format and to save the file to your local file system.

# Correcting an Undefined Session Duration

To correct an undefined session duration, you must manually adjust the time in your exported report before importing the session data into your billing system. For example, if you exported the **Time Tracking** report in an Excel format, open the exported spreadsheet (.xls) file and change the undefined session duration to the correct value. This ensures your billing system information is accurate.

# The Tax Research Process

The overriding purpose of tax research is to find solutions to the tax problems of your clients or employer. The process is similar to that of traditional legal research. The researcher must find authority, evaluate the usefulness of that authority, and apply the results of the research to a specific situation.

One can identify two essential tax research skills:

- The first is using certain mechanical techniques to identify and locate the tax authorities that relate to solving a problem.
- The second entails a combination of reasoning and creativity and is more difficult to learn. A researcher must begin with native intelligence and imagination and add training and experience to search efficiently and effectively. In many cases, no legal authority directly addresses the problem. In that situation, the researcher must combine seemingly unrelated facts, ideas, and legal authority to arrive at a novel conclusion. This creative ability often spells the difference between success and failure in the research process.

## Outline of Tax Research Process

As the tax problems of the client become more significant, the related tax research can become time-consuming and expensive. The tax researcher must work as efficiently as possible to obtain the solution to the client's problem. A framework for the research process is essential.

The tax research process can be categorized into six major steps. Tax researchers (especially those without a great amount of experience at the task) must approach the resolution of a tax problem in a structured manner, so that the analysis of the problem will be thorough and the solution complete.

1. Establish the facts.
2. Identify the issues.
3. Locate the authority.
4. Evaluate the authority.
5. Develop conclusions and recommendations.
6. Communicate the recommendations.

# Search Examples

These detailed examples show how to use the search connectors available in Checkpoint.

- To narrow or expand your search, use **connectors**.
- To search for word/phrases within a certain number of words/phrases from each other, use **proximity** searches.
- To combine connectors and proximity searches and define their order, use **parentheses**.
- To search for code or regulation subsections, use **parentheses**.

# Example - Code & Regulation Subsection Search

To search for a code or regulations subsection, use parentheses and quotes.

**Example:** "401(a)(1)"

**Finds:** documents containing the code section: 401(a)(1).

# Example - Combining Connectors & Proximity Searches

When combined, connectors and proximity searches can be an important element in performing narrowly defined yet comprehensive searches.

**Example**: ("partner deduct*" /p "excise tax") not "income tax"

**Finds**: documents containing the phrase partner deduction or partner deductible and the phrase excise tax or excise taxes within a paragraph (or 50 words of each other), but not if the phrase income tax appears in the document.

**Note**: When search connectors are used together in a search phrase,Checkpoint first evaluates ^ (logical NOT), then | (logical OR), and then & (logical AND). Parentheses should be used whenever you combine search connectors (for example, using &, |, or ^).

search connectors (for example, using &, |, or ^).

# Example - Proximity Search

Search for documents in which your keywords or phrase occurs within a certain proximity of another keyword or phrase.

To see an example, click a situation below.

| To search for a word or phrase: | And: | Use: |
|---|---|---|
| within one paragraph (50 words) of another word/phrase in any order | in any order | /# (where # equals number) |
| | in exact order | pre/# (where # equals number) |
| within the same sentence (20 words) as another word/phrase | in any order | /s |
| | in exact order | pre/s |
| within one paragraph (50 words) of another word/phrase in any order | in any order | /p |
| | in exact order | pre/p |

## Proximity Examples:

### Within n words of another word/phrase (/# , pre/#)

Searches for a word/phrase that occurs within n number of words from another word/phrase.

**In any order:**

> **Example**: "disclosure exception" /7 "negligence penalty"
>
> **Finds**: documents containing the phrase disclosure exception within 7 words of the phrase negligence penalty regardless of their order.

**In exact order:**

> **Example**: "depreciation deduction" pre/6 "straight-line method"
>
> **Finds**: documents containing the phrase depreciation deduction within 6 words of the phrase straight-line method, in that exact order.

### Within the same sentence (/s , pre/s)

Searches for a word/phrase where it occurs within one sentence (or 20 words) of another word/phrase.

**In any order:**

> **Example**: "disclosure exception" /s "negligence penalty"
>
> **Finds**: documents containing the phrase disclosure exception within 20 words of the phrase negligence penalty regardless of their order.

**In exact order:**

> **Example**: "depreciation deduction" pre/s "straight-line method"
>
> **Finds**: documents containing the phrase depreciation deduction within 20 words of the phrase straight-line method in that exact order.

### Within the same paragraph (/p , pre/p)

Searches for a word/phrase where it occurs within one paragraph (or 50 words) of another word/phrase.

**In any order:**

**Example**: "disclosure exception" /p "negligence penalty"

**Finds**: documents containing the phrase disclosure exception within 50 words of the phrase negligence penalty regardless of their order.

**In exact order:**

**Example**: "depreciation deduction" pre/p "straight-line method"

**Finds**: documents containing the phrase depreciation deduction within 50 words of the phrase straight-line method in that exact order.

# SearchTips

Choose words that accurately describe your research issue. If a keyword search does not find the information you need, consider the following issues.

### Using legal or specialized language

As you choose keywords, consider who wrote the material that you seek. Most libraries containing official source material use legal language that makes keyword searching more challenging.

### Keywords too specific

Consider whether your topic might be part of a broader issue. Do not get too caught up in specifics. Ask yourself, what else might relate to my particular issue?

### Keywords too generic

Stay away from commonly used words such as tax and deduction. Because they occur so frequently, they may not get you any closer to the results you seek.

Additionally, prepositions (for example, to, on) and articles (for example, the, a) will not always be accepted for search purposes, due to the high frequency with which they occur. For example, if you use "the" as your first or last keyword, Checkpoint warns you that your keywords are too common to be searched.

However, there is no problem if you use words such as "the" or "and" as part of a phrase. For example, the keyword string "ordinary and necessary expenses" (with quotes) would retrieve documents containing ordinary and necessary expenses, ordinary or necessary expenses, and so forth.

### Hyphens and hyphenated compound words

Hyphens are searchable. If you type e-mail, documents containing at least one occurrence of e-mail with hyphens will be retrieved. Additionally, all occurrences of e-mail and e mail will be retrieved.

Using hyphens when searching for compound word search terms will generate the broadest search results possible.

### Acronyms

Taxation- and Finance-related documents are filled with widely used acronyms of names of institutions, government agencies, tax concepts, and so on. Checkpoint makes use of "equivalencies" to ensure that, for terms with popular acronyms, searches retrieve both the expanded name and its acronym.

Some examples include Net Operating Loss (NOL), Generally Accepted Accounting Principles (GAAP), and Financial Accounting Standards Board (FASB).

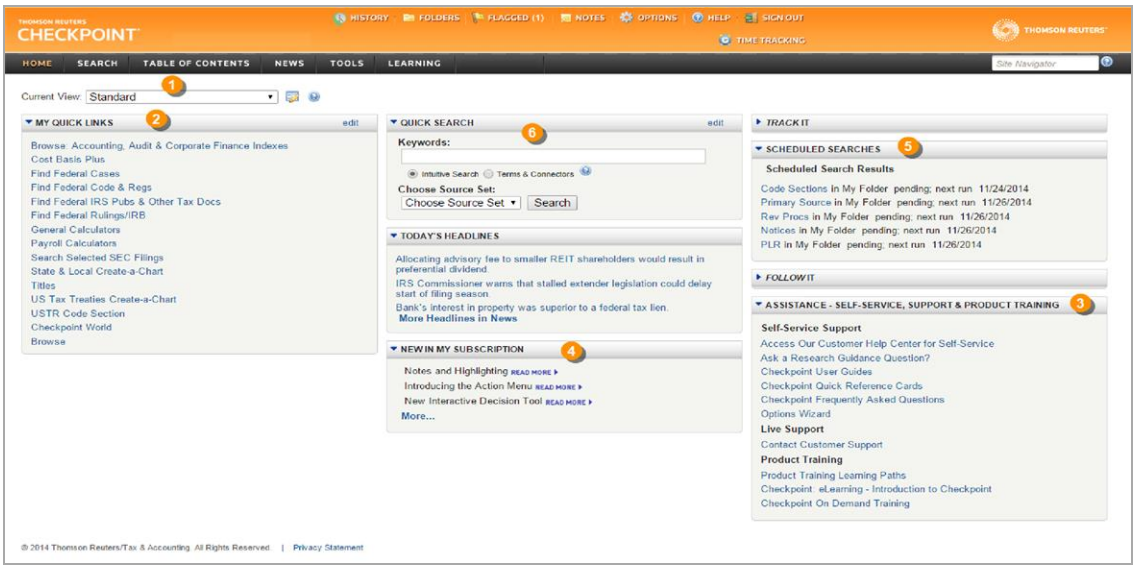
### Codes or regulations with parentheses

Perform a Keyword Search by typing the code section or regulation citation in the Keywords field using quotation marks, for example, "381(c)(4)" or use Citation Search to find the Code section, Statute, or Regulations Number.

**Alert**! When full text searching from the **Keywords** field, remember to include quotation marks around the citation if it uses parentheses, for example, "381(c)(4)". DO NOT use quotes when using a Citation Search template.

# Using the Home Screen

Checkpoint's **Home** screen provides quick links to Checkpoint tools and documents, access to current news of interest to Checkpoint subscribers, updates related to Checkpoint features and content, and easy access to training and support. You can change the content and customize the features as needed.




1. Choose from several **Home** screen views that organize content by practice area. Each view's layout and content can be modified to match your preferences. Create your own view consisting of selected content panes.

2. **My Quick Links** provides quick access to frequently used areas of Checkpoint. You can tailor **My Quick Links** to your specific needs by modifying the list to reflect your areas of interest and frequent use.

3. The **Assistance - Self-service, Support and Product Training** links make it easy to access instructor-led and self-study product training, user guides and other reference materials, support and training news, support contact information and Checkpoint user options.

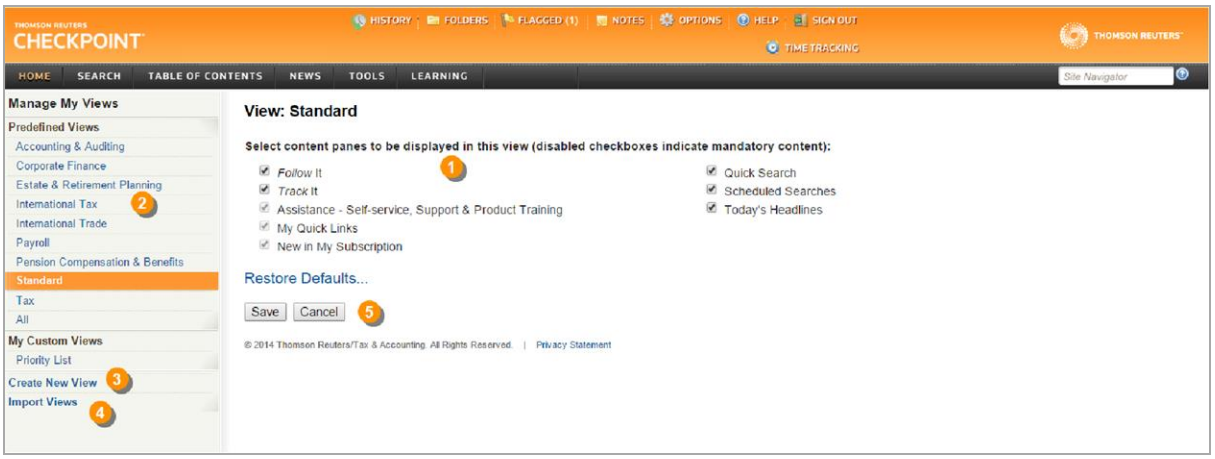
4. Keep up-to-date with news and product developments. Consult **Today's Headlines** for links to current news. Review **New in My Subscription** to learn about new features and enhancements specific to your version of Checkpoint.

5. Use **Home** screen features to display the results of **Scheduled Searches**, ongoing citation tracking **(Track It)** and proposed legislation being followed **(Follow It).**

6. Enter your keyword in the **Quick Search** box and click **Search** to perform a keyword search. You can perform a **keyword search** in two ways: A **Terms & Connectors** search lets you provide one or more keyword terms, and an **Intuitive Search** identifies sentences, connectors, or citations, and interprets your query accordingly. You can also perform a **Quick Search** on a predefined source set you create by selecting from the **Choose Source Set** drop-down list.

# Using the Manage My Views Screen

The **Manage My Views** screen opens when you click the **Manage my views** tool next to the **Current View** field on the **Home** screen. Here you can change the layout and content of a predefined **Home** screen view, create a custom view, or import another user's custom view.




1. Change the content to be displayed on the current predefined view or your custom view by selecting or clearing content pane titles. Mandatory content pane check boxes are disabled and cannot be cleared.
2. All of the predefined views are listed on the left navigation bar. Click a predefined view to modify its contents. Click **All** to modify a view that offers content panes from all of the other views.
3. Click **Create New View** to build a **Home** screen view tailored to your specific needs. Select from a wide selection of content panes and provide a unique name for the view.
4. Import another user's custom view by clicking **Import Views**. You have the option to include or exclude the user's **Quick Links**.
5. Click **Save** to preserve a modified view, or abandon the modified view by clicking **Restore Defaults** or **Cancel**.

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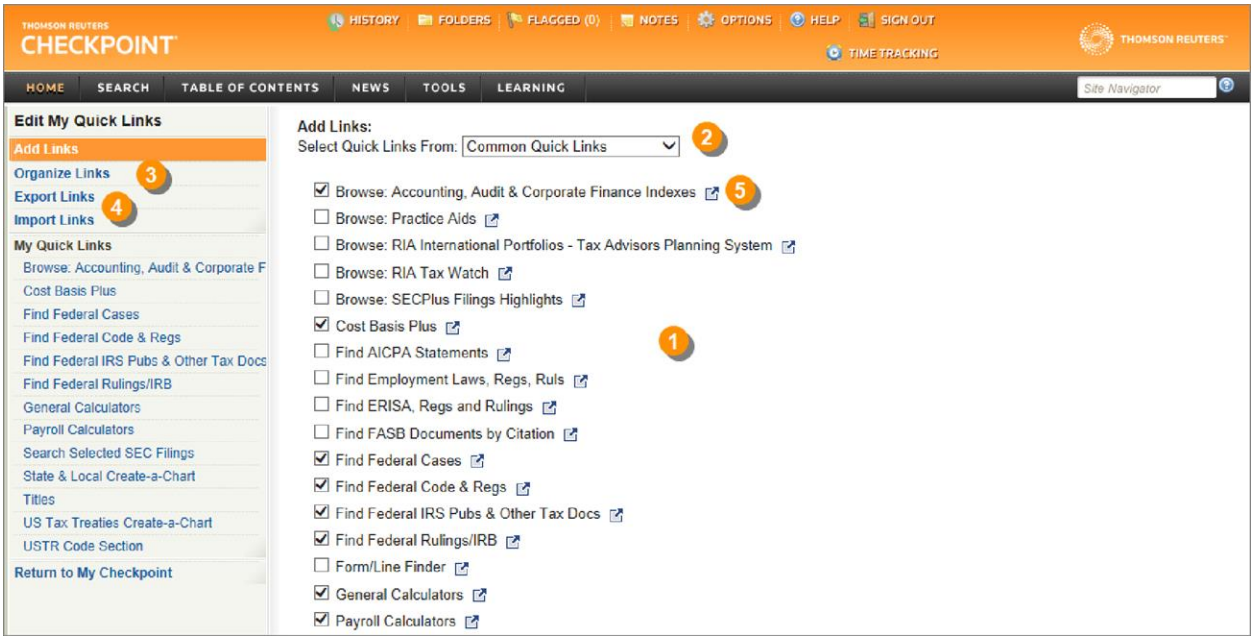
# Using the Edit My Quick Links Screen

The **Edit My Quick Links** screen lets you determine the makeup of the **My Quick Links** menu on the **Home** screen. Modify the list, re-order the links, and share the list with other Checkpoint users.




1. Create a new version of **My Quick Links** by selecting and clearing check boxes.
2. Open the drop-down list to select Quick Links from other Checkpoint sources, including **My Titles** in the **Table of Contents**, the **Tools** screen, and the Checkpoint **Site Map**.
3. Use the **Organize Links** tool to modify the order of your selected Quick Links. You can also rename links or insert blank lines in your list.
4. Share an edited **My Quick Links** with another Checkpoint user with the **Export Links** feature. Receive another user's **My Quick Links** with the **Import Links** feature.
5. Click a **Permalink** tool to display a link's address. Save or bookmark the link to an external location, such as your desktop.

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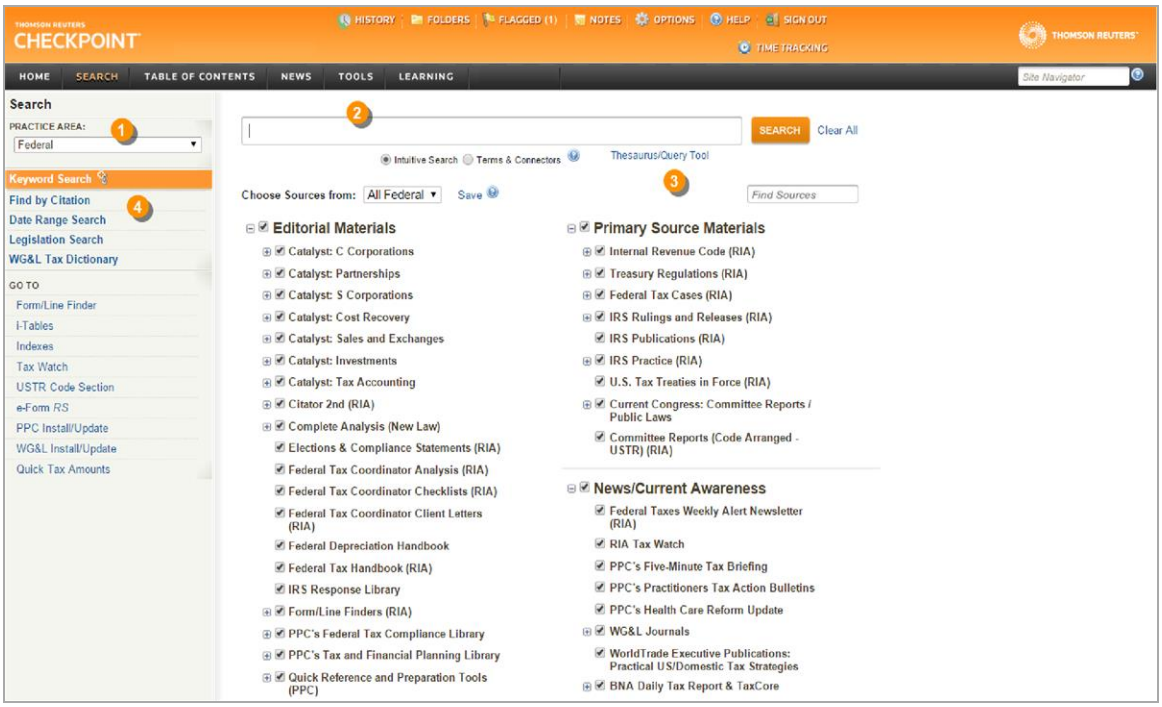
# Using the Search Screen

The **Search** screen provides a launch point from which to perform keyword searches on selected sources in several practice areas. Use the left navigation bar to access customized search templates and tools based on the practice area.




1. Select a **practice area** to use sources and search tools specific to an area of research. Practice areas include **Federal**, **State & Local**, **Estate Planning**, **Pension & Benefits**, **International**, **International Trade**, **Payroll**, and **Accting, Audit & Corp Finance**.

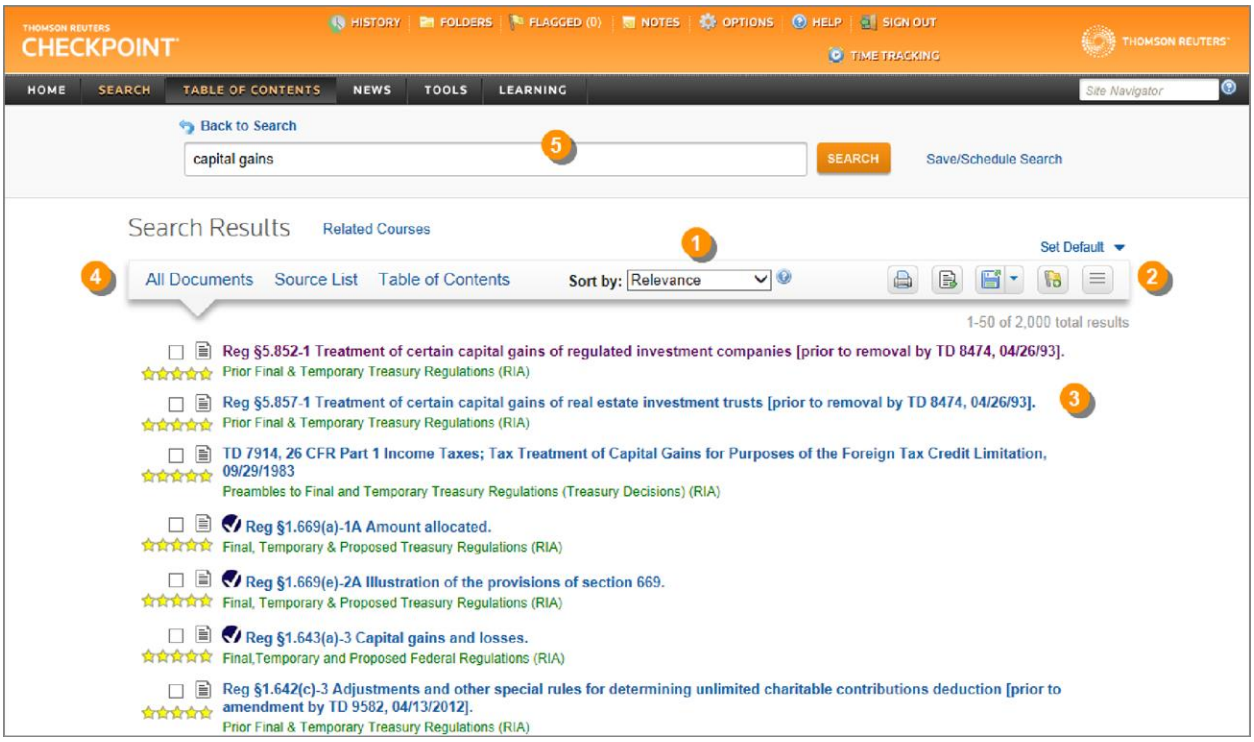
2. To perform a keyword search enter search terms, select the sources to search, and then click **Search**. You can perform a **keyword search** in two ways: A **Terms & Connectors** search lets you provide one or more keyword terms, and an **Intuitive Search** identifies sentences, connectors, or citations, and interprets your query accordingly.The search **AutoComplete** feature will suggest keywords as you type in the field.

3. Open Checkpoint's **Thesaurus/Query Tool** to enhance your keywords with such features as a spell checker, a thesaurus of alternative terms, a list of connector symbols, and previously used keyword combinations.

4. Select a search template to perform a search by filling in requested information. For example, use **Find by Citation** to request a code section from an official documentation source.

# Using the Search Results: All Documents Screen

The **All Documents** view of the **Search Results** screen lists all of the documents found in your keyword search. From this screen, you can open a document, change the view, modify your keywords and resubmit the search, or select documents to print, export, or save.


CHECKPOINT
HISTORY
FOLDERS
FLAGGED (0)
NOTES
OPTIONS
HELP
SIGN OUT
TIME TRACKING
THOMSON REUTERS
HOME
SEARCH
TABLE OF CONTENTS
NEWS
TOOLS
LEARNING
Site Navigator
Back to Search
capital gains
5
SEARCH
Save/Schedule Search
Search Results
Related Courses
Set Default
4
All Documents
Source List
Table of Contents
Sort by: Relevance
1
2
1-50 of 2,000 total results
Reg §5.852-1 Treatment of certain capital gains of regulated investment companies [prior to removal by TD 8474, 04/26/93].
Prior Final & Temporary Treasury Regulations (RIA)
Reg §5.857-1 Treatment of certain capital gains of real estate investment trusts [prior to removal by TD 8474, 04/26/93].
3
Prior Final & Temporary Treasury Regulations (RIA)
TD 7914, 26 CFR Part 1 Income Taxes; Tax Treatment of Capital Gains for Purposes of the Foreign Tax Credit Limitation, 09/29/1983
Preambles to Final and Temporary Treasury Regulations (Treasury Decisions) (RIA)
Reg §1.669(a)-1A Amount allocated.
Final, Temporary & Proposed Treasury Regulations (RIA)
Reg §1.669(e)-2A Illustration of the provisions of section 669.
Final, Temporary & Proposed Treasury Regulations (RIA)
Reg §1.643(a)-3 Capital gains and losses.
Final,Temporary and Proposed Federal Regulations (RIA)
Reg §1.642(c)-3 Adjustments and other special rules for determining unlimited charitable contributions deduction [prior to amendment by TD 9582, 04/13/2012].
Prior Final & Temporary Treasury Regulations (RIA)

1. Documents can be sorted by **Relevance** or by **Table of Contents**. **Relevance** sorting uses a ranking system to place the most promising documents at the top of the list and identifies them with gold stars. **Table of Contents** sorting lists documents in the order that they appear in Checkpoint's Table of Contents.
2. Select the **Show words around hits** icon to display the words surrounding the keywords or content elements relevant to your search. You can also select one or more documents and then click a document tool to **Print**, **Export**, or **Save** the selected documents.
3. Documents are listed by title in blue text. Beneath each title, the source containing the document appears in green text. Purple text identifies a document you have already viewed.
4. Change the **Search Results** view to **Source List** to list all sources in which your search found keywords. Change the view to **Table of Contents** to see a list of the sources you selected for your keyword search in the order they appear in Checkpoint's Table of Contents and how many documents within each source contain the specified keywords.
5. Modify your keywords and click **Search** to submit the new search. Click **Save/Schedule Search** to preserve your search criteria and, optionally, run the search automatically on a periodic schedule.

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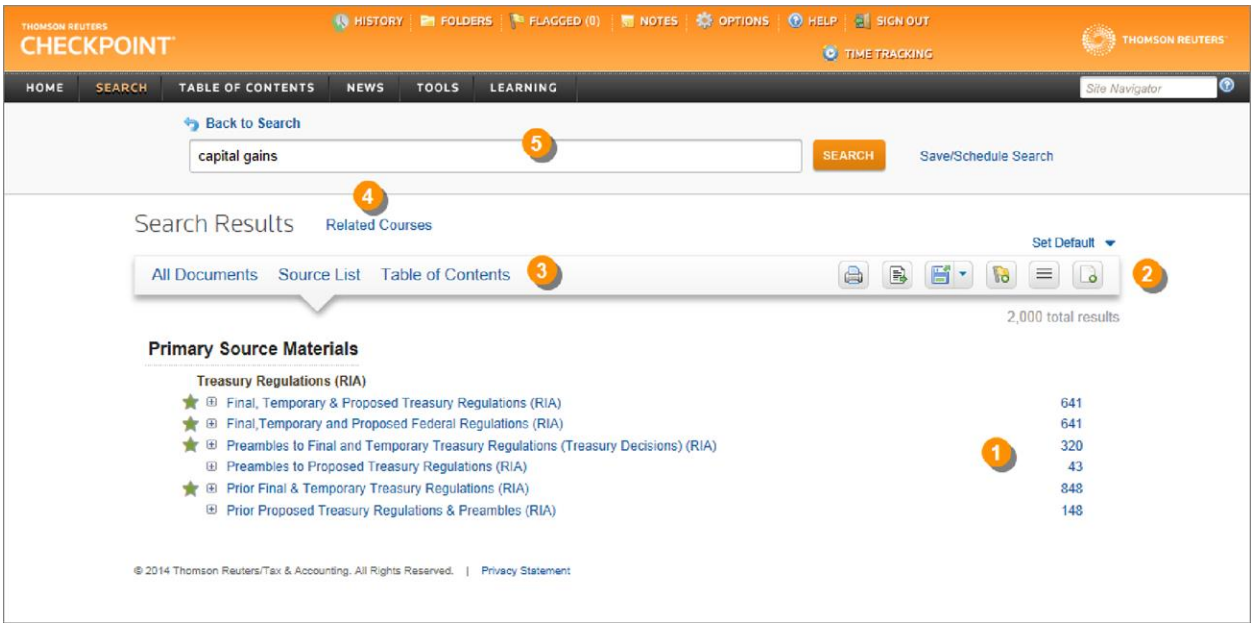
# Using the Search Results: Source List Screen

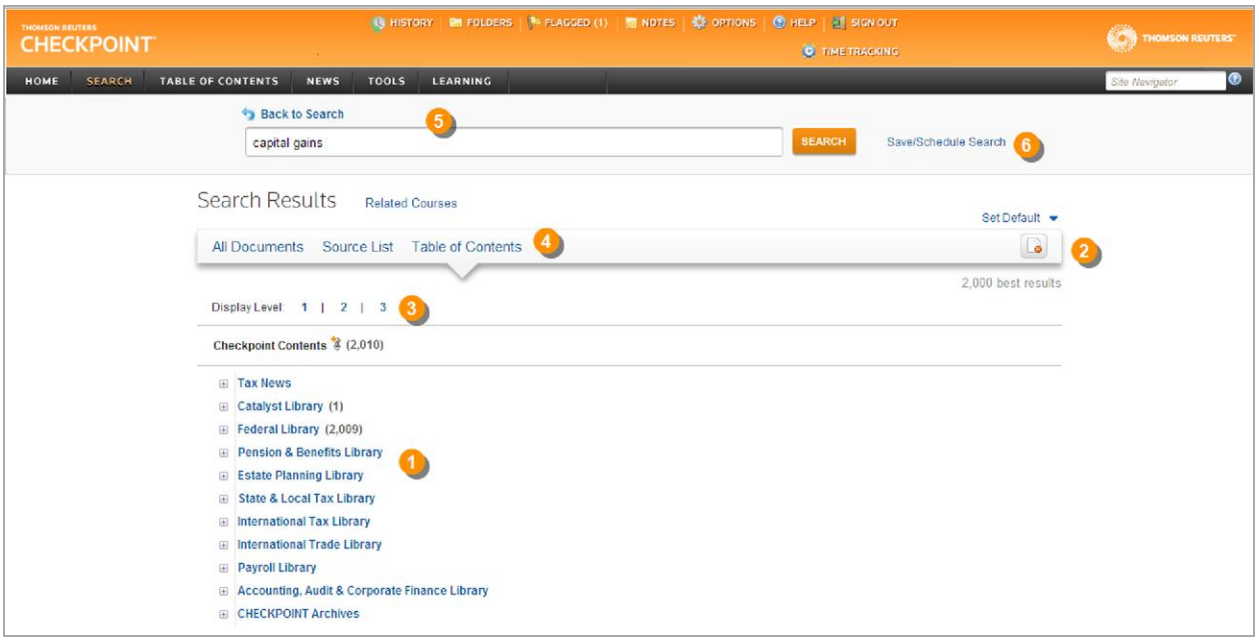
The **Source List** view is the default view of the **Search Results** screen. This view lists all of the sources you selected for your keyword search and indicates how many documents within each source contain the specified keywords. The keywords are also displayed at the top in the search box. From this screen, you can drill down to find documents, change the view, or modify your keywords and resubmit the search.




1. Each source included in your keyword search is listed in the **Source List**. The numbers on the right indicate how many "hits," or documents containing keywords, were found within each searched source.
2. **View hits only** is the default when Source List opens. With this view searched sources in which no keywords were found are hidden. To view all searched sources, select the **View all results** icon.
3. Change the **Search Results** view to **All Documents** to list all documents in which your search found keywords. Change the view to **Table of Contents** to see a list of the sources you selected for your keyword search in the order they appear in Checkpoint's Table of Contents and how many documents within each source contain the specified keywords.
4. Click **Related Courses** to find recommended training based on your search criteria. All courses are available from **Checkpoint Learning**, providing CPE from the Tax & Accounting business of Thomson Reuters.
5. Modify your keywords and click **Search** to submit the new search. Click **Save/Schedule Search** to preserve your search criteria and, optionally, run the search automatically on a periodic schedule.

# Using the Search Results: Table of Contents Screen

The **Table of Contents** view of the **Search Results** screen lists all of the sources you selected for your keyword search in the order that they appear in Checkpoint's Table of Contents and indicates how many documents within each source contain the specified keywords. From this screen, you can drill down to find documents, change the view, or modify your keywords and resubmit the search.




1. Each listed source includes a number to indicate the number of documents found that contain keywords. Display the next level of content for each source by clicking the "+" symbol or the source title.
2. **View all results** is the default in the Table of Contents view. With this view searched sources in which no keywords are displayed. To view only searched sources that include the keywords, select the **View hits only** icon.
3. Click the number of the Table of Contents level you want to view. Level 1 displays only the high-level Table of Contents source titles. Level 2 opens each source to the next content level. Level 3 opens sources to one further level.
4. Change the **Search Results** view to **All Documents** to list all documents in which your search found keywords. Change the view to **Source List** to list all sources in which your search found keywords.
5. Modify your keywords and click **Search** to submit the new search. Click **Save/Schedule Search** to preserve your search criteria and, optionally, run the search automatically on a periodic schedule.

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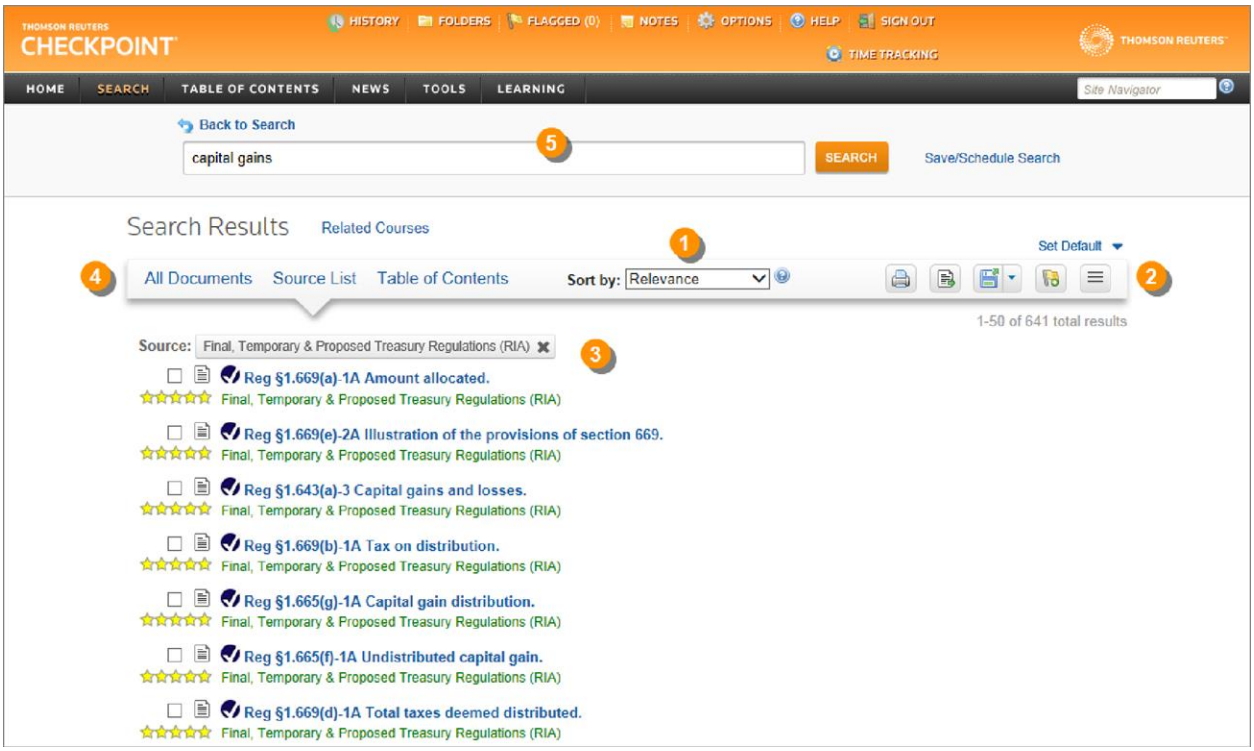
# Using the Search Results: Source Documents Screen

When you select a source in the **Source List** view of the **Search Results** screen, the screen displays all documents found in the selected source. From this screen, you can open a document, change the view, modify your keywords and resubmit the search, or select documents to print, export, or save.




1. Documents can be sorted by **Relevance** or by **Table of Contents**. **Relevance** sorting uses a ranking system to place the most promising documents at the top of the list and identifies them with gold stars. **Table of Contents** sorting lists documents in the order that they appear in Checkpoint's **Table of Contents**.
2. Select the **Show words around hits** icon to display the words surrounding the keywords or content elements relevant to your search. You can also select one or more documents and then click a document tool to **Print**, **Export**, or **Save** the selected documents.
3. The **source title** is shown above the document list and also appears in green text below each document title. Documents are listed by title in blue text. Purple text identifies a document you have already viewed.
4. Change the **Search Results** view to **All Documents** to list all documents in which your search found keywords or change to **Table of Contents** to see a list of the sources you selected for your keyword search in the order they appear in Checkpoint's Table of Contents and how many documents within each source contain the specified keywords.
5. Modify your keywords and click **Search** to submit the new search. Click **Save/Schedule Search** to preserve your search criteria and, optionally, run the search automatically on a periodic schedule.

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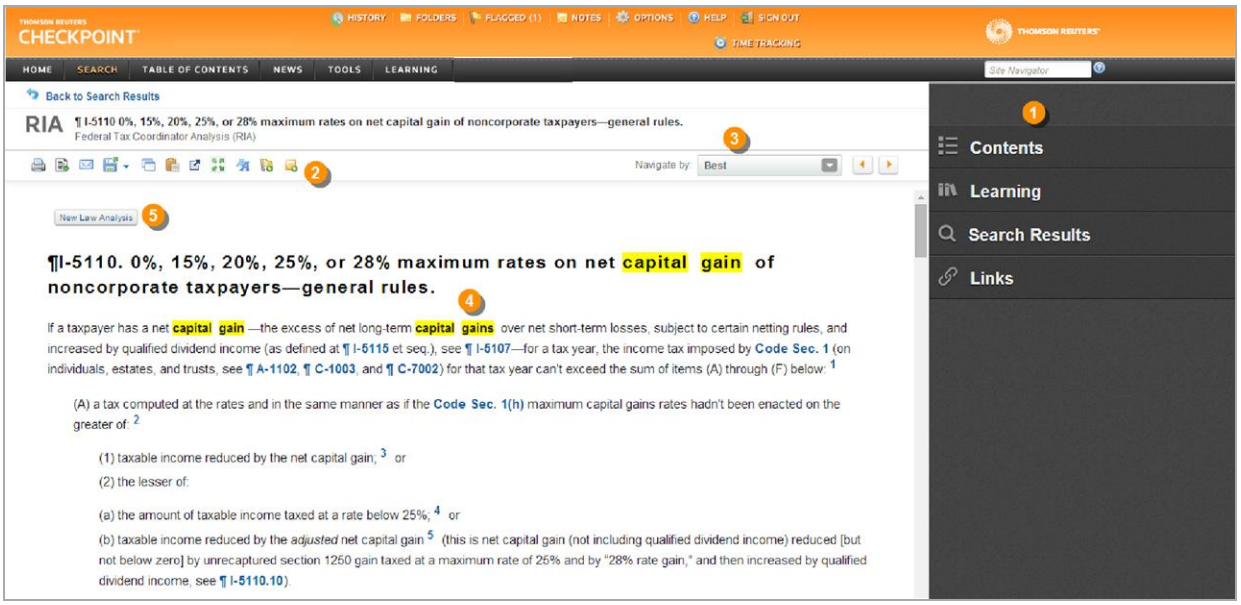
# Using the Document Screen

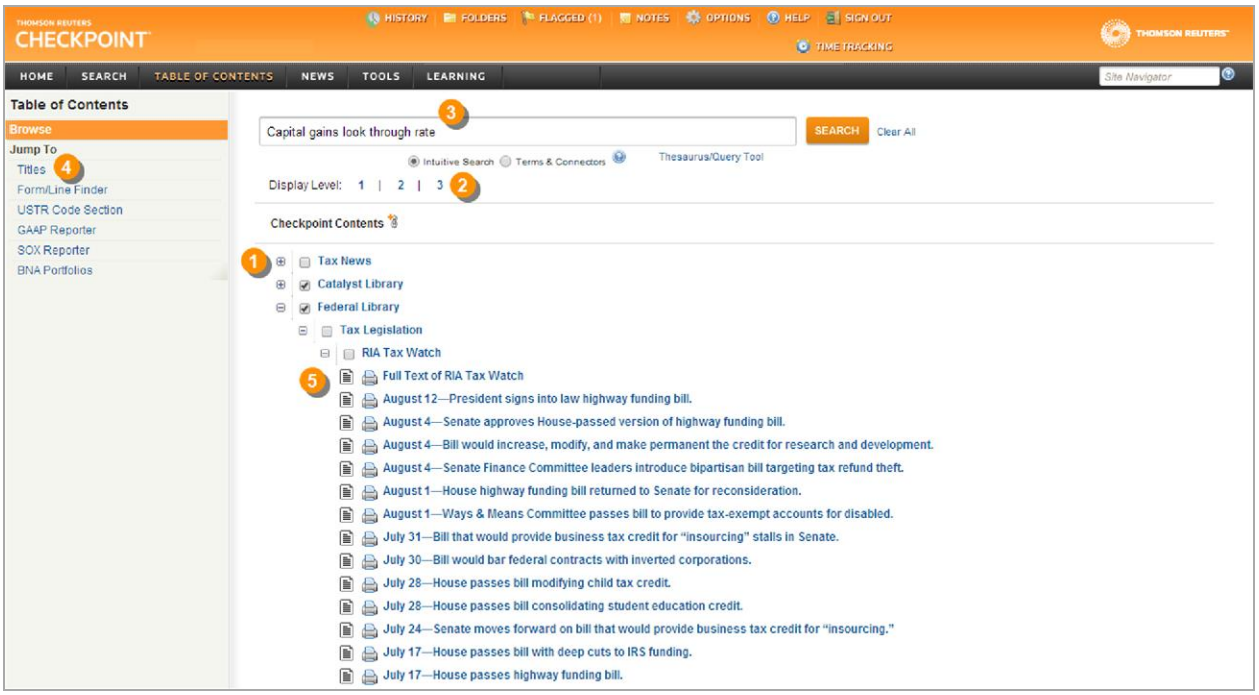
The **Document** screen provides the format for viewing and managing Checkpoint documents, with various tools and features for navigating, saving, printing, sharing, exporting, adding notes, and flagging the content. You can also highlight document text and save the highlighted text as a note.


CHECKPOINT
HISTORY
FOLDERS
FLAGGED (1)
NOTES
OPTIONS
HELP
SIGN OUT
TIME TRACKING
HOME
SEARCH
TABLE OF CONTENTS
NEWS
TOOLS
LEARNING
Back to Search Results
RIA
¶ I-5110 0%, 15%, 20%, 25%, or 28% maximum rates on net capital gain of noncorporate taxpayers—general rules.
Federal Tax Coordinator Analysis (RIA)
Navigate by:
Best
New Law Analysis
¶I-5110. 0%, 15%, 20%, 25%, or 28% maximum rates on net capital gain of noncorporate taxpayers—general rules.
If a taxpayer has a net capital gain —the excess of net long-term capital gains over net short-term losses, subject to certain netting rules, and increased by qualified dividend income (as defined at ¶ I-5115 et seq.), see ¶ I-5107—for a tax year, the income tax imposed by Code Sec. 1 (on individuals, estates, and trusts, see ¶ A-1102, ¶ C-1003, and ¶ C-7002) for that tax year can't exceed the sum of items (A) through (F) below:
(A) a tax computed at the rates and in the same manner as if the Code Sec. 1(h) maximum capital gains rates hadn't been enacted on the greater of:
(1) taxable income reduced by the net capital gain; or
(2) the lesser of:
(a) the amount of taxable income taxed at a rate below 25%; or
(b) taxable income reduced by the adjusted net capital gain (this is net capital gain (not including qualified dividend income) reduced [but not below zero] by unrecaptured section 1250 gain taxed at a maximum rate of 25% and by "28% rate gain," and then increased by qualified dividend income, see ¶ I-5110.10).
Contents
Learning
Search Results
Links

1. Within a document, you can use the Context Panel on the right to take advantage of additional navigation and features. The available tabs listed in the Context Panel will depend on the document displayed and how you arrived at that document (by Keyword or Table of Contents).
2. **Document tools include Print, Export, E-mail, Save, Open in New Window, Selected Text Option, Show Permalinks, Full Screen, Document Display Options, Flag this document,** and **Add Note.**
3. Use the **Navigate by** field and arrow buttons to advance to the next **Best** result or **Document** found by your search, the next document listed in the **Table of Contents**, or the next occurrence of a **Keyword**.
4. Keyword occurrences appear with yellow highlighting throughout the open document.
5. Use the top line and side line link buttons that appear across the top of a document or embedded within the document to link to related documents in the **Links** section of the **Context Panel**.

# Using the Table of Contents Screen

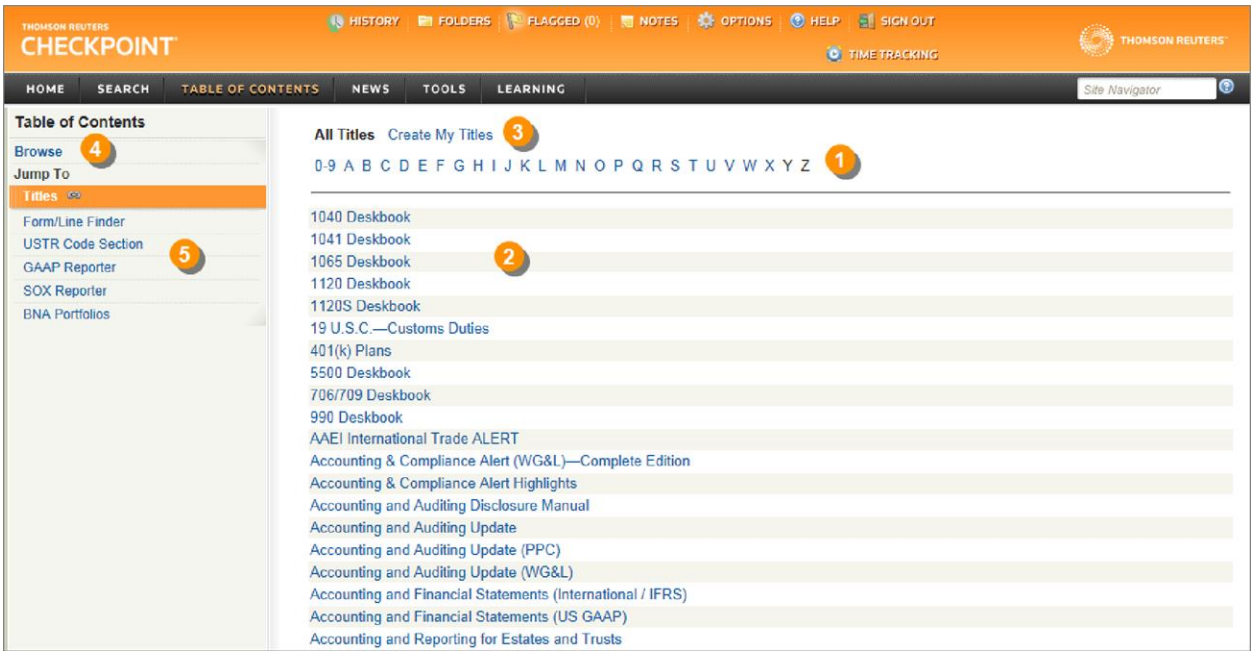
Checkpoint's **Table of Contents** screen, accessed from Checkpoint's menu bar, provides access to all of the sources available to you through your subscription. Content is organized hierarchically into broad practice area categories. You can drill down through levels of content to find individual documents.




1. Click the "+" symbol next to a title to view its contents, or click the title name to display a **Table of Contents** screen listing the title and its contents.
2. Click the number of the **Table of Contents** level you want to view. Level 1 displays only the high-level **Table of Contents** source titles. Level 2 expands sources to the next content level. Level 3 expands sources even further.
3. To perform a keyword search enter search terms, select the sources to search, and then click **Search**. You can perform a **keyword search** in two ways: A **Terms & Connectors** search lets you provide one or more keyword terms, and an **Intuitive Search** identifies sentences, connectors, or citations, and interprets your query accordingly. Use the **Thesaurus/Query Tool** for advanced search features.
4. The **Jump To** options provide navigation to content and tools, including **Titles**, which lets you create a custom set of links to topical sections of the **Table of Contents**, and **Form/Line Finder**, which lets you search tax form guidance by entering a tax year, form number, and line number.
5. Print documents from the **Table of Contents** by clicking the print icon next to a document in the list. To print multiple documents, hold down the **CTRL** key on your keyboard and click on the Print icon next to the documents you want to print.

# Using the Table of Contents: All Titles Screen

You can access the **All Titles** screen from Checkpoint's **Table of Contents** by clicking **Titles** in the **Jump To** section of the left navigation bar. **All Titles** provides an alphanumeric list of Checkpoint's content that is specific to your subscription. Each title is a link to a corresponding section of the **Table of Contents**. You have the option to create a customized list of selected titles.




1. Select **0-9** or any letter to advance to the corresponding section of the alphanumeric list. For example, clicking **G** advances you to titles that begin with the letter **G**.
2. Click any title to open the corresponding section within the **Table of Contents**.
3. Use **Create My Titles** to create a customized list of titles. Clicking **Create My Titles** provides a check box next to each title and adds **Save** and **Cancel** options to the **Titles** menu. Select the titles you want to include in your list and then click **Save** to generate the list.
4. Click **Browse** to return to the main **Table of Contents screen**.
5. Click one of the **Jump To** options to access the **Form/Line Finder** tool or one of the listed areas of content within the **Table of Contents**.

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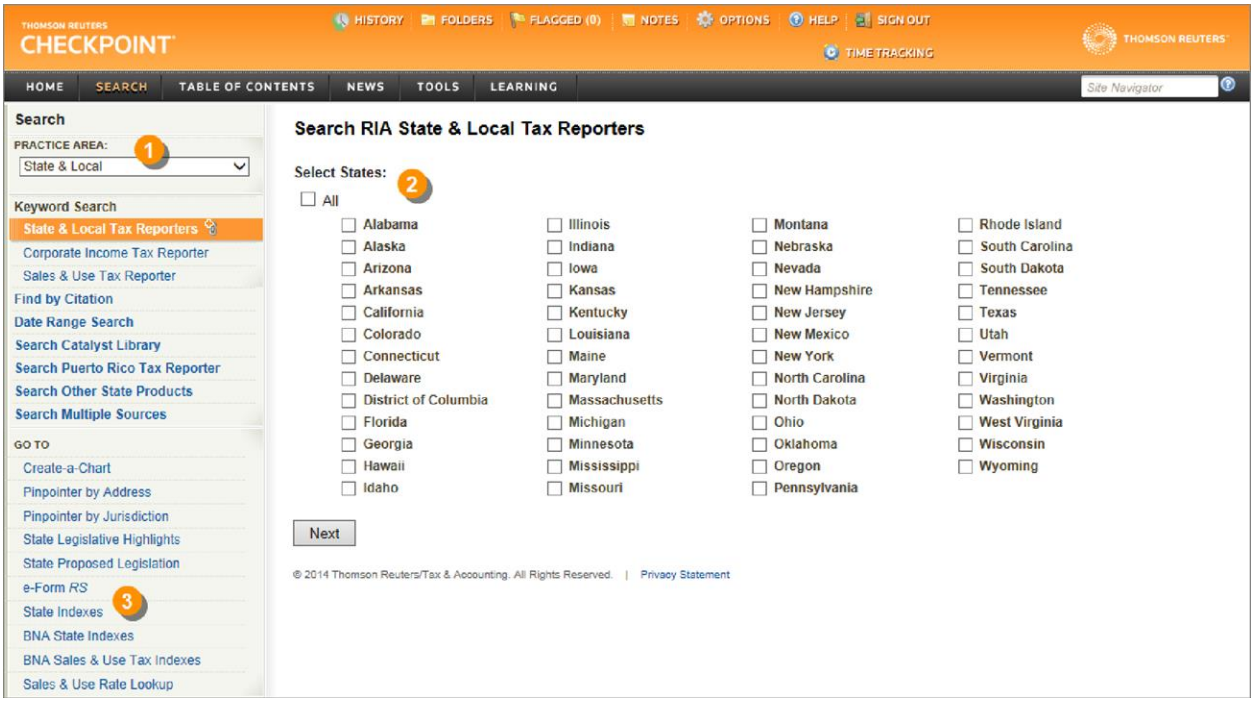
# Using the State & Local Search Screen

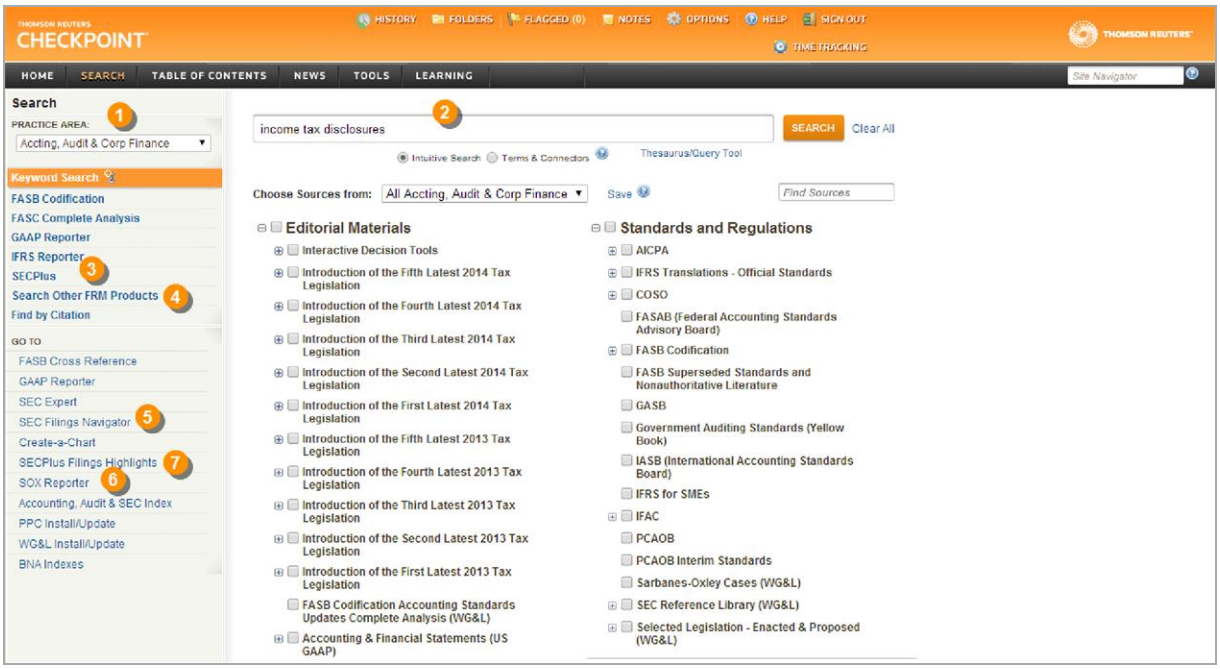
The **State & Local** practice area on the **Search** screen provides a launch point from which to perform keyword searches on state and local sources.




1. To perform a **State & Local** search, select **State & Local** from the **Practice Area** drop-down list.
2. Select the check box for the state or states whose sources you want to search. Select**All** to include all states in your search.
3. The **State Index** tool provides access to tax-related laws for each state, indexed by the state's own categories.

# Using the Accounting, Audit & Corporate Finance Search Screen

The **Accounting, Audit, & Corporate Finance** practice area on the **Search** screen provides a launch point from which to perform keyword searches on related sources. You can use the left navigation bar search templates associated with this practice area view for quick access to specific research targets.




1. To change the **Search** screen to the **Account, Audit & Corporate Finance** practice area, select **Accting, Audit & Corp Finance** from the **Practice Area** drop-down list.

2. To perform a keyword search enter search terms, select the sources to search, and then click **Search**. You can perform a **Keyword Search** in two ways: A **Terms & Connectors** search lets you provide one or more keyword terms, and an **Intuitive Search** identifies sentences, connectors, or citations, and interprets your query accordingly.The search **AutoComplete** feature will suggest keywords as you type in the field.

3. Select **SECPlus** to search for selected SEC filings.

4. Select **Search Other FRM Products** to link to other FRM products such as AICPA Technical Practice Aids, IASB Advanced Search, and PCAOB Advanced Search.

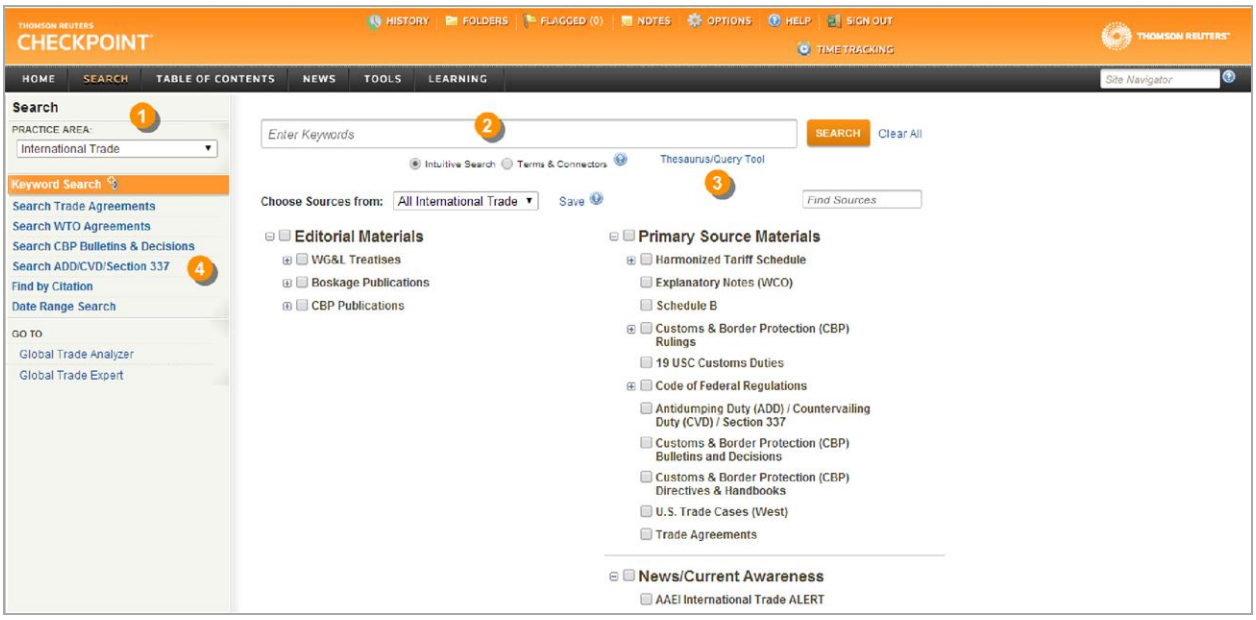
5. The **SEC Filings Navigator** guides you through commonly used SEC forms, such as the 10-K and 10-Q. Get valuable summary guidance, plus extensive search templates, which you can use to identify the critical disclosures required for each item on the form.

6. Use the **SECPlus Financial Fundamentals Create-a-Chart,** to get a complete picture of a company's financial data. You can compare balance sheets, income statements, cash flow items, or financial ratios among filers. You can also link from company financials to original filings, and you can export financial tables. Data includes 75 operating and valuation ratios, normalized to a common platform.

The **SOX Reporter** provides comprehensive analysis of the Sarbanes-Oxley Act. It is integrated with SEC and PCAOB primary rules, regulations, cases with explanations, annotations, and practice aids.

# Using the International Trade Library Search Screen

The **International Trade** practice area on the **Search** screen provides a launch point from which to perform keyword searches on related sources. Use the left navigation bar search templates for quick access to specific research targets.




1. Select the **International Trade** practice area to use sources and search tools specific to the area of research.

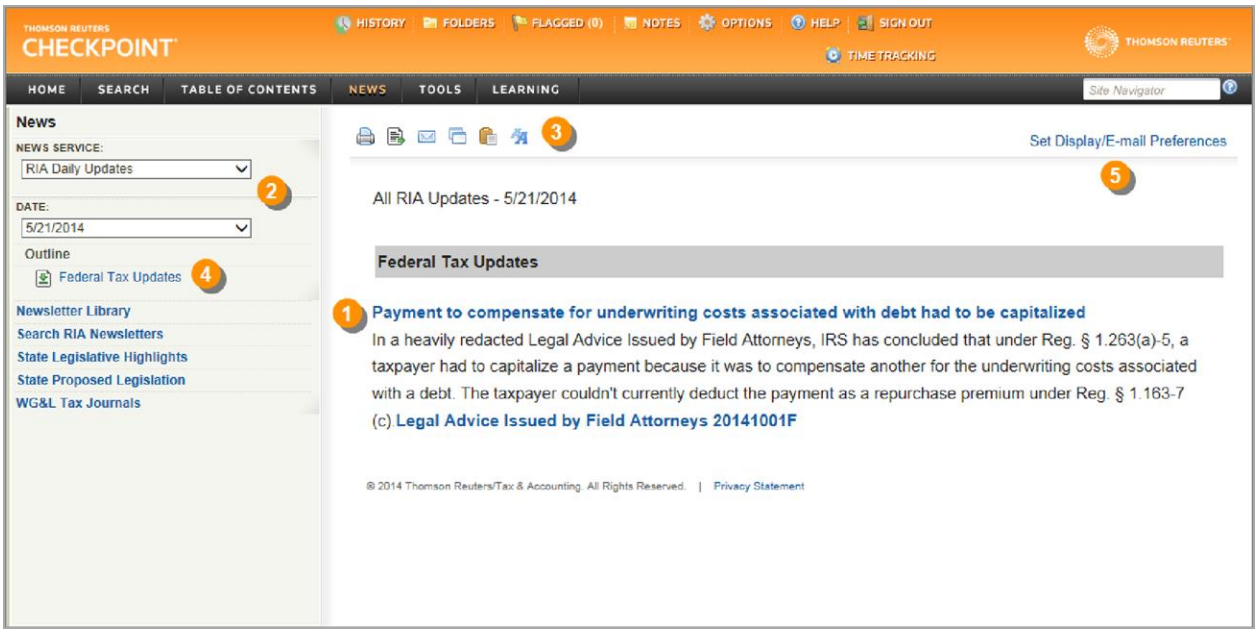
2. To perform a keyword search enter search terms, select the sources to search, and then click **Search**. You can perform a **keyword search** in two ways: A **Terms & Connectors** search lets you provide one or more keyword terms, and an **Intuitive Search** identifies sentences, connectors, or citations, and interprets your query accordingly.The search **AutoComplete** feature will suggest keywords as you type in the field.

3. Open Checkpoint's **Thesaurus/Query Tool** to enhance your keywords with such features as a spell checker, a thesaurus of alternative terms, a list of connector symbols, and previously used keyword combinations.

4. Select a search template to perform a search by filling in requested information. For example, use **Find by Citation** to request a code section from an official documentation source.

# Using the News Screen

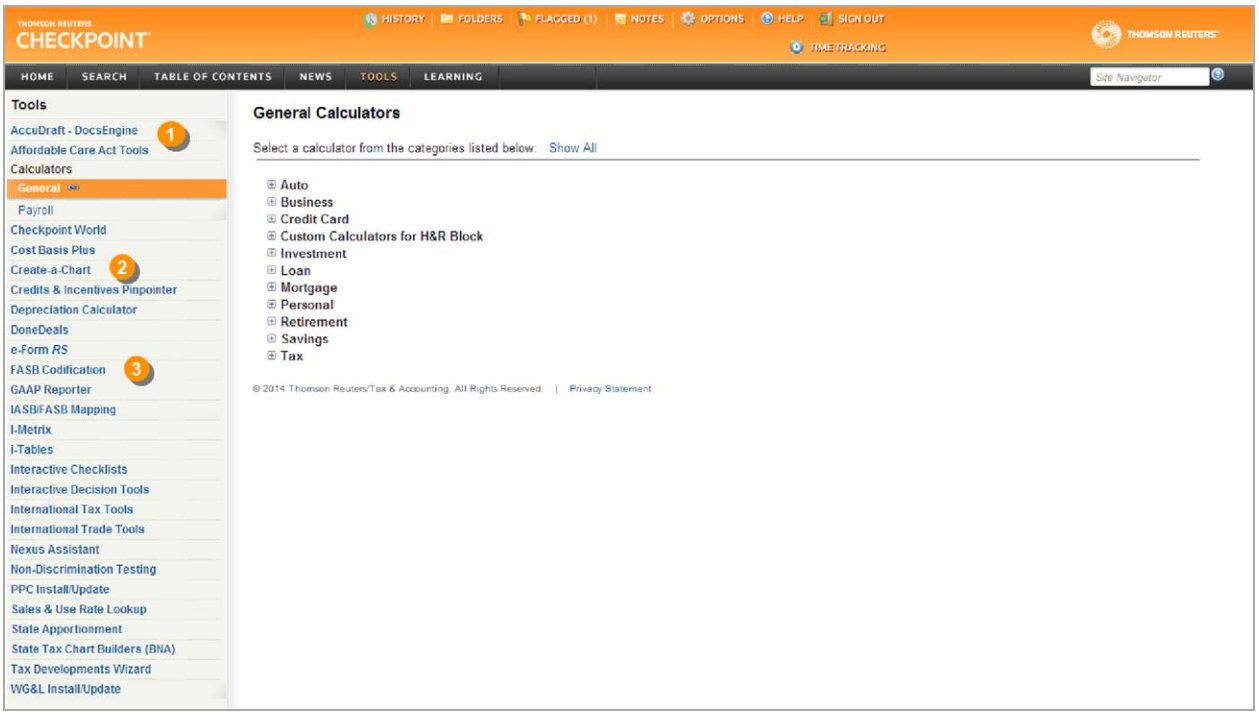
The **News** screen provides the latest editions of several subscription-based news services in the areas of tax, accounting, and finance. Most of the news services provide access to earlier editions and e-mail delivery options.




1. Headlines, summaries, or opening paragraphs are generally provided for each news article. In some newsletters, the headline is a link to the full article. In others, a "document" symbol at the end of the paragraph links you to the full article.
2. Select from news services included in your Checkpoint subscription. Titles include **News & Insight**, **RIA Daily Updates**, **Accounting & Compliance Alert**, **PPC's Daily Update**, **BNA Daily Tax Report**, **BNA Int'l Tax Monitor**, **IBFD Tax News Service**, **Towers Watson**, **EBIA Weekly**, and **Sabrix VAT News**. Click a date on the **Date** drop-down list, if available, to access earlier editions.
3. **Document tools** let you print, export, e-mail, and manage the news content.
4. Advance to a section of the newsletter by selecting the section title from the **Outline** on the left navigation bar.
5. Click **Set Display/E-mail Preferences** and arrange to receive any of your subscribed newsletters by e-mail. Options include receiving a **Daily Update** version or a **Complete Newsletter** version offered on a less frequent schedule. This option is not available for all newsletters.

# Using the Tools Screen

The **Tools** screen provides access to a variety of time-saving online tools to help you find and organize information, forecast and manage business scenarios, and install or update additional tools. The set of tools on your **Tools** screen is specific to your Checkpoint subscription.




1. Each tool includes guided steps with simple instructions. Make a selection from the left navigation bar and begin using the tool.
2. The **Create-a-Chart** tool organizes selected comparative information into a chart with links to supporting documentation. Create-a-Chart tools are available for several sets of content, including **State & Local**, **Payroll Tax**, and **International Tax Rates**.
3. **FASB Codification** and **International Tax Tools** are two examples of areas that offer a suite of tools.

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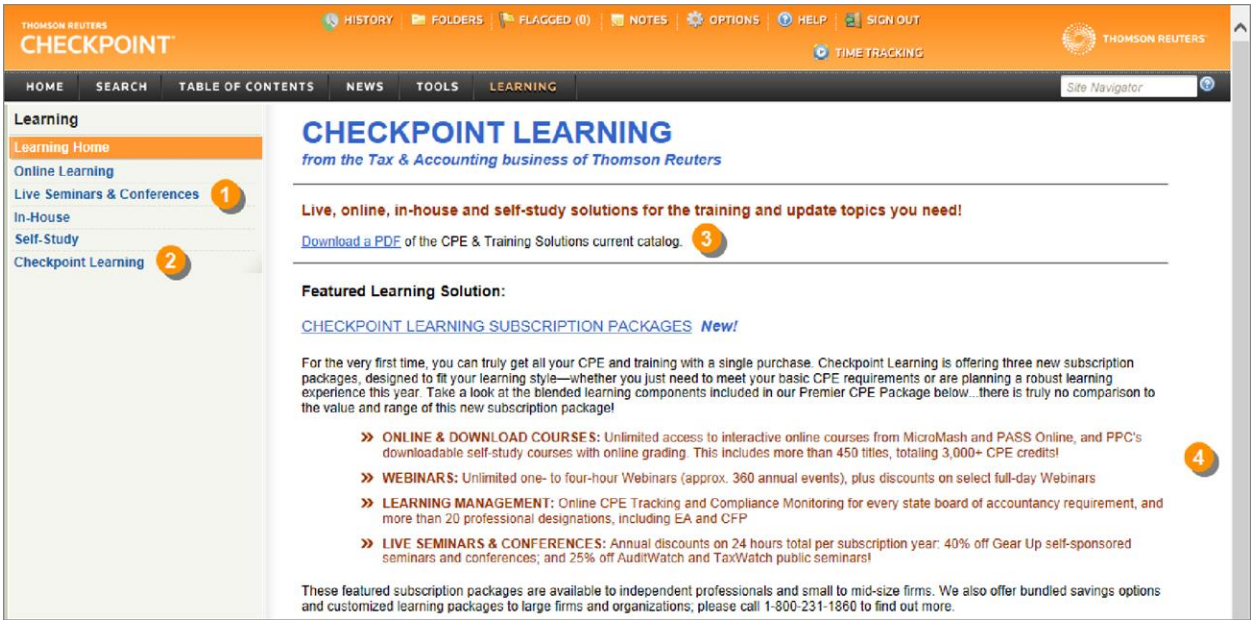
# Using the Learning Screen

The **Learning** screen provides access to a virtual library of CPE-earning and learning opportunities in a variety of topics, price ranges, and delivery formats.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4
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1. Click a link on the left navigation bar for information about online learning, seminars and conferences, in-house training, or self-study courses.
2. Learn about the range of services offered by **Checkpoint Learning**. Register for a free account with this learning platform that provides tools and features for managing CPE and learning paths, with access to hundreds of courses.
3. Download your own copy of the **CPE & Training Solutions** catalog from the **Learning Home** screen.
4. Scroll down for additional learning resources, including the **CPE & Training Solutions eZine**, the interactive **Course Finder** tool, and **Hot Topics**.

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# Technical Acknowledgements

Icon Library makes use of the Silk Icons created by Mark James – http://www.famfamfam.com/lab/icons/silk/

The javascript makes use of the following libraries and plugins:

- jQuery – http://jquery.com/
- jQueryUI – http://jqueryui.com/
- jQuery Mobile - http://jquerymobile.com/
- clueTip - http://plugins.learningjquery.com/cluetip/
- FixedHeaderTable - http://fixedheadertable.com/
- hoverIntent - http://cherne.net/brian/resources/jquery.hoverIntent.html
- treeTable - http://ludo.cubicphuse.nl/jquery-plugins/treeTable/doc/
- touch-scroll - http://github.com/neave/touch-scroll

---

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